MAKE WORK SUCK LESS

THE MANAGER YOU WISH YOU HAD: MAKING WORK SUCK LESS

INTRODUCTION: The Philosophy of Making Work Suck Less

Let's start with a truth that's both uncomfortable and blindingly obvious: work often sucks.

I'm not being flippant here. Whether you're overseeing a warehouse team coordinating shipments across the country, managing engineers building fintech products, or leading a group of hobbits on a quest to destroy magical jewelry, the struggles of management are universal. People feel undervalued. Systems break down. Dark lords send angry Slack messages.

But here's another truth: it doesn't have to suck quite so much.

I've spent years as a hiring manager across various industries, from logistics to financial technology. I've built teams from scratch, replaced myself with team leads, and coached countless professionals through career transitions. Throughout all of it, I've come to one undeniable conclusion: the manager makes all the difference.

Not the perks. Not the ping-pong tables. Not even the salary (though that certainly helps). The manager — how they listen, how they give feedback, how they create an environment of psychological safety — that's what determines whether work is a source of meaning or misery.

Why Management Matters

Think about the worst job you've ever had. Now, think about the best. I'm willing to bet that in both cases, your manager played a crucial role in that experience.

The data backs this up. According to Gallup's State of the American Manager report, managers account for at least 70% of the variance in employee engagement scores. A study from the Society for Human Resource Management found that 84% of workers blame bad managers for creating unnecessary stress. When people quit jobs, they're often not leaving companies — they're leaving bosses.

This isn't just an academic exercise. Poor management has real costs:

- Lost productivity when employees disengage
- Higher turnover rates and the associated costs of rehiring
- Reduced innovation as people become afraid to take risks
- Damage to mental health that extends far beyond the workplace

The ripple effects are enormous. And yet, most of us become managers with little to no training. We're promoted because we were good individual contributors, then left to figure out this entirely different skill set on our own.

It's like being really good at playing the violin and then suddenly being asked to conduct the orchestra. Sure, you understand music, but that doesn't mean you know how to coordinate dozens of musicians into a harmonious whole.

My Journey from Support Engineer to Coach

I didn't set out to be a management expert. I was going to be a high school Spanish teacher. New York City would be my home, teaching my career, and comedy my passion. But the winds of state certification blew my plane off course.

I found a job as a support engineer at a logistics API company. At this startup, the cliché that "you wear many hats" was true: in name, I was a support engineer, but in practice, I was a project, product, and operations manager; I was a sales engineer, onboarding specialist, and technical program manager.

Five months after starting my career in San Francisco, my manager pitched me on hiring and leading a team in Lehi, Utah. I accepted and went. I built out the team to sixteen support engineers and replaced myself with three team leads.

Along the way, I discovered what it means to truly need to delegate. I found the power of presence of mind as an indicator in the hiring process. I established coherent processes. I made mistakes — so many mistakes — and learned from them.

When I eventually joined Affirm as a Senior Technical Account Manager, I started managing a team there too. I hired, promoted, and coached. I advocated. I consoled. I facilitated. I discovered, scoped, and defined; I encouraged, I refocused, I aligned. I directed and diffused. I reframed.

Most importantly: I learned the game, inside and out.

Now, I help others make work suck less. Because if there's one thing I've learned, it's that being a good manager isn't about having all the answers — it's about knowing the right questions to ask.

How to Use This Book

This isn't a traditional management book full of buzzwords and corporate speak. You won't find jargon here, and I solemnly swear not to use the word "synergy" unironically. Instead, this is a practical guide to the very human art of helping people do their best work.

Throughout these pages, you'll find:

- Real stories from my experiences and those of clients I've coached
- Practical frameworks for handling everything from difficult conversations to career planning
- Exercises to help you reflect on your own management style
- Templates you can use for common management scenarios

You might notice I use a lot of references to *The Lord of the Rings*. Not just because I'm a nerd (though I am), but because these stories provide a shared language that helps illustrate key management principles. If Gandalf can manage the complex dynamics of

a fellowship with vastly different skills, backgrounds, and even species, we can probably handle a cross-functional team meeting.

The book is divided into four parts:

1. The Foundations of Good Management: Core principles that underpin effective leadership
2. Practical Management Skills: Tactical approaches to everyday management challenges
3. Building Your Management Career: Strategic guidance for your own professional journey
4. Personal Growth as a Manager: Developing the self-awareness that separates good managers from great ones

You don't need to read it in order. If you're facing a specific challenge right now, feel free to jump to that section. Having a hard time giving feedback? Head to Chapter 4. Wondering if it's time to leave your job? Chapter 5 has you covered. Trying to figure out if an MBA is worth it? Skip to Chapter 8.

But if you're starting from scratch, beginning at the beginning will give you a solid foundation to build upon.

The Manager You Wish You Had

Throughout my career, I've heard countless stories from people about "the manager they wish they had" — someone who would listen, who would advocate for them, who would help them grow, who would see them as human beings first and employees second.

My goal with this book is to help you become that manager.

Not because it will make you popular (though it might). Not because it will advance your career (though it will). But because creating workplaces where people can thrive is one of the most meaningful contributions you can make.

After all, we spend about a third of our adult lives at work. That's too much time to spend being miserable or making others miserable.

So let's dive in. Let's figure out how to make work suck less — for your team, for your organization, and yes, even for yourself.

Because the manager you wish you had? That can be you.

CHAPTER 1: Presence of Mind - The Ultimate Hiring and Management Tool

Why Technical Skills Aren't Everything

I was a hiring manager at a few different companies, from the logistics space all the way to fintech. And I would have made the same hiring decisions across all of those teams. Regardless of the context — warehouse or office, packages or loans, inventory management or API support — the people that did the best job were the people that could try something new, learn from that experience, and get better the next time.

TL;DR: Hiring managers want candidates that can learn.

Let me share a story that illustrates this perfectly. Back at the logistics company, we were interviewing for a technical support role. Two candidates stood out on paper:

Candidate A had a computer science degree and three years of experience with the exact stack we were using. Their resume was a laundry list of technical qualifications that matched our job description almost perfectly.

Candidate B had a background in customer service at a retail store and had spent the last year teaching themselves to code through online courses. Their technical skills were clearly less developed, but during the interview, they walked us through a problem they'd encountered while building a personal project and how they systematically figured it out.

Care to guess which one we hired?

Candidate B is now a senior engineer at the company.

Why? Because Candidate A could demonstrate knowledge. Candidate B could demonstrate learning. And in an environment where technologies, requirements, and challenges constantly evolve, learning beats knowing every time.

Don't get me wrong — technical skills are necessary for all lines of work in some capacity. But they do not prove you can adapt, that you can ask relevant questions, that you get it.

This is what people mean when they say "the education system is broken," "they're just teaching you to regurgitate information," "we need to be teaching critical thinking in schools." In too many cases, high marks in school are explicitly tied to an ability to demonstrate knowledge. But if knowing was all it took, why has Wikipedia not run every occupation out of business?

The Value of Adaptability Over Knowledge

Even if you formally learned a technical skill, the job is going to be different than what you learned. That is a fact. Whether you have more to learn or less to learn, you will have to learn on the job.

I see two possible scenarios for how starting your career went:

1. You learned a concrete technical skill in a formal context, maybe you got a degree or certification in it. But when you started the job, you found that the tangible work of it was different from school. You had to be taught, or had to learn by doing, how to do the tasks of the job.

2. You did not learn a concrete technical skill in a formal context, so when you found yourself a job, you had to be taught, or had to learn by doing, how to do the tasks of the job.

In both cases, you showed that you can learn on the job, and what's more, you had to. There are no roles in existence that do not require you to learn on the job.

The key to making a change in your career—or being successful in your current role—isn't showing that you can already do the job, it's showing that you can learn how to do the job.

Think about the roles in your organization. You can divide all roles along the dimension of dynamicity: will you be doing the same thing over and over again? Or will you encounter a new problem that you will be expected to navigate, learning and balancing the needs of those around you along the way?

More importantly: which of those two roles do you want to spend doing 40 hours a week working at?

Companies like Comcast manage out any autonomy and ingenuity, by design. They take a Henry Ford, assembly-line view to work and workers, and they break roles in places like support centers down into scripts. They make it so that "anyone can do it."

Same for Amazon warehouses and deliveries. Same for software developers at Oracle (there's a reason for the term "code monkeys"). These companies have made a strategic decision to prioritize repeatability over adaptability.

But here's the thing: any work where you repeat the same tasks without a clear service to others, without ownership over your work, or without novelty to it will suck.

Don't get me wrong, even with all of the things above going right, work can still suck. But without them, it will definitely suck.

How to Recognize and Cultivate Presence of Mind

So what exactly is this "presence of mind" I keep mentioning? It's not just being alert or paying attention, though that's part of it. It's a quality that encompasses:

- Situational awareness: The ability to read the room, understand context, and adapt accordingly
- Critical thinking: Questioning assumptions and approaching problems systematically
- Emotional intelligence: Understanding both your own emotions and those of others

- Adaptive learning: Being able to transfer knowledge from one domain to another
- Comfort with uncertainty: The ability to make reasonable decisions with incomplete information

As a manager, you need to both identify this quality in potential hires and cultivate it in your existing team members.

Recognizing Presence of Mind in Interviews

Here are some indicators I look for during the interview process:

1. How candidates handle unexpected questions

   Rather than asking pre-packaged technical questions with "right" answers, I pose scenarios that don't have obvious solutions. I'm not looking for perfect answers—I'm watching for their thought process.

2. Their ability to say "I don't know"

   Candidates who confidently admit what they don't know and then discuss how they would find out demonstrate security in their learning capability. Those who bluff or try to talk around gaps in knowledge often lack the self-awareness needed for continuous improvement.

3. Questions they ask

   The quality of a candidate's questions often reveals more about their thinking than their answers to my questions. Do they ask about the context behind a problem? The impact of potential solutions? The experiences of users or teammates?

4. How they talk about past failures

   Everyone fails. What matters is what they learned and how they applied those

lessons going forward.

Cultivating Presence of Mind in Your Team

As a manager, you can help develop this quality in your team:

1. Create psychological safety

    People need to feel safe to admit when they don't know something or when they've made a mistake. This starts with how you respond to uncertainty and failure.

2. Ask better questions

    Instead of asking "Did you finish the report?" try "What challenges did you encounter while working on the report?" This signals that you value their thinking process, not just completion.

3. Provide context, not just tasks

    Explain the why behind the what. When people understand the larger purpose of their work, they can make better judgment calls when circumstances change.

4. Encourage constructive dissent

    Make it clear that thoughtful disagreement is valuable. You want people who will push back when something doesn't make sense, not just execute blindly.

5. Recognize and reward learning

    Celebrate not just achievements but also lessons learned. Share stories of your own learning moments.

Case Study: Building a Team That Learns

When I moved to Utah to build out a support team for the logistics company, I had to hire rapidly—we needed to go from zero to sixteen people in less than a year.

I could have focused solely on technical qualifications, looking for people who already knew everything about shipping APIs and logistics. Instead, I prioritized presence of mind.

We hired people with backgrounds in retail, education, customer service, and even a former cake decorator. What they had in common wasn't technical knowledge—it was the ability to learn quickly, think critically, and adapt to changing circumstances.

The result? Within six months, our team was handling complex technical support issues more effectively than teams with "more qualified" individuals. When the company's needs changed—as they inevitably do in startups—our team adapted quickly while others struggled.

The people that were the most successful were always the ones that could learn. Show you have good sense, and the world is yours.

Looking for Learning in Your Team's Work History

As a manager reviewing your team members' growth potential, look at their work history and think about the things they had to learn. Here are the kinds of questions you should be asking:

- How have they approached problems in the past?
- How have they improved processes at their place of work?
- How have they resolved conflict?
- How have they taken the initiative?

Ultimately, all of these questions are coming back to one idea: how well do they learn?

You're not looking for stories where they immediately knew the right answer. A stronger story than:

"I changed the format for sending escalations to warehouse managers; we saw these escalations resolved 40% more quickly."

is:

"Initially, all escalations were written free-form, so there was no structure to them. I started off defaulting to a sort of letter-writing format. I found the information I packed in there was often missed, so we ended up having a lot of back and forth. Bit by bit I adjusted how I would write these escalations, ultimately moving toward a split approach: I would have one section with a bulleted list of what was being asked, with a second section outlining the reasoning. I asked the folks in the warehouse for feedback and heard that they did appreciate having both: they wanted the at-a-glance information, but having the reasoning also built a lot of trust between the support team and the people touching the product. When we reviewed how this impacted resolution time, we actually saw this format sped it up by about 40%; we rolled it out to the team after that."

I will concede, the detail provided in the second example is longer. It is less concise. But it gives so much more clarity on the thought process, it gives enough information for the other person to see how they came to the solution. A great outcome without a reflection of how you got there makes it seem like a fluke. A great outcome with an explanation shows a pattern.

Showing that you have the ability to try, test, and tinker in a thoughtful way is miles better than stumbling upon a single solution without an idea as to how. Stating you improved an outcome shows you could solve one thing. Explaining how you tried, learned, and improved shows you can solve anything.

Technical Skills vs. Presence of Mind: Finding the Balance

Let me be clear: technical skills matter. A surgeon needs to know anatomy. A programmer needs to understand algorithms. An accountant needs to know tax law.

But technical skills are often the price of entry—the baseline requirement to even be considered for a role. They're necessary but not sufficient.

Think of it this way:

Technical skills determine if someone can do the job today. Presence of mind determines if they can do the job tomorrow.

As a manager, your role isn't just to assess where people are now, but to envision where they could be with the right guidance and opportunities.

This applies not just to hiring, but to development plans, promotion decisions, and team assignments. The team member who consistently demonstrates presence of mind might be better suited for that challenging new project than the one with more technical experience but less adaptability.

Closing Thoughts: The Learning Organization

As a final thought, consider that organizations, like individuals, need to learn and adapt. When you build a team of people with presence of mind, you're creating the foundation for a learning organization—one that can evolve with changing circumstances and continuously improve.

The manager who values presence of mind isn't just building a better team for today; they're building a resilient team for whatever tomorrow brings. In a world where the only constant is change, that might be the most valuable skill of all.

In the next chapter, we'll explore another critical aspect of effective management: understanding the difference between needs and expectations, and how this distinction can transform your approach to leadership.

CHAPTER 2: Understanding Needs vs. Expectations

The Fundamental Difference Between Needs and Expectations

Picture this: It's Monday morning. One of your team members, let's call her Alex, was supposed to send you a report before the weekend. It's now 9:15 AM, and the report isn't in your inbox. You feel a flash of irritation—this is going to throw off your entire morning. You fire off a terse message asking where the report is.

At 9:20, Alex responds with the completed report and an apology. She actually sent it on Friday at 4:55 PM, but to your personal email by mistake.

What just happened here? Your expectation was that the report would be in your work inbox by Monday morning. Your need was to have the information to start your week. The expectation wasn't met, but the need actually was—the report was complete and sent on time, just to the wrong destination.

This simple scenario illustrates one of the most powerful distinctions in management: the difference between needs and expectations.

Defining Needs and Expectations

Let's define these terms clearly:

Needs are the core of what a person requires. This can be an emotional need or a logistical need, but the idea is that there is a clear justification for this need.

Expectations, in contrast, are needs masked by time. They're habituated needs. Expectations are created when needs are met in one particular way over and over, leading someone to expect "this need must be met this way."

Think of it this way: Needs are the destination; expectations are the specific route we've become accustomed to taking.

As a very tangible, if contrived, example:

Jeff is hungry. Every day, Jeff's father makes them a PB&J. Jeff's need is hunger: Jeff needs food. Jeff's expectation is that they'll be eating PB&J to meet the need of hunger. When Jeff's father serves them baked ziti for a change, Jeff's expectations are not met.

So Jeff cries.

In this context, Jeff is 6 years old. In 35-year-old Jeff, the frustration may not be expressed through tears, but if Jeff's a bad manager, they will still conflate "My team needs to support their clients" with "My team needs to respond within 30 minutes to every email."

In reality:

The expectation is "My team needs to respond within 30 minutes to every email" The need is "My team needs to support their clients"

The question a good manager will ask themselves is: Does my team need to respond within 30 minutes to every email in order to support their clients?

How Expectations Mask Actual Needs

Most workplace conflicts stem from unmet expectations rather than unmet needs. And often, these expectations haven't been clearly communicated or mutually agreed upon.

Here are some common examples:

- A manager expects detailed daily updates but what they need is confidence that projects are on track
- A team member expects immediate feedback on their work but what they need is guidance to improve
- A client expects a particular solution but what they need is their problem solved

When we focus on the unmet expectation, we get stuck in battles over process and method. When we focus on the underlying need, we open up multiple paths to resolution.

The Danger of Unstated Expectations

The most problematic expectations are the ones we don't articulate. We assume everyone shares our understanding of how things should work—and then we're surprised and disappointed when they don't.

I once worked with a client, Boromir (not his real name, obviously), who was frustrated with his team. "They never take initiative," he complained. "I have to tell them exactly what to do every time."

When we dug deeper, it became clear that Boromir had an unstated expectation: team members should proactively identify problems and propose solutions. This was reasonable—but he had never communicated it. His team, meanwhile, was operating under a different expectation: "Do what the boss assigns, no more, no less."

The need—efficient problem-solving—was something both Boromir and his team valued. But their conflicting expectations about how to meet that need were causing friction.

Once Boromir explicitly stated his expectation and explained why it mattered, his team was more than willing to adjust. They weren't resistant to taking initiative; they simply didn't know it was wanted.

Breaking Down Workplace Conflicts to Their Core Needs

When conflicts arise in the workplace, a powerful tool for resolution is to strip away the expectations and focus on the underlying needs.

Let's practice with some common scenarios:

Scenario 1: The Micromanager

- Visible Conflict: Manager constantly checks in, requires updates, and reviews work in excessive detail
- Manager's Expectation: Team should provide detailed, frequent updates on progress
- Manager's Need: Confidence that critical work is on track and risks are being addressed

- Team's Expectation: Trust to execute work without constant oversight
- Team's Need: Autonomy to work efficiently and develop professional judgment

Resolution Approach: Focus on meeting the manager's need for confidence while preserving the team's need for autonomy. This might look like scheduled checkpoints, clear success criteria, or risk escalation protocols that provide visibility without constant interruption.

Scenario 2: The Missed Deadline

- Visible Conflict: Team member didn't deliver work when expected
- Manager's Expectation: Work will be completed by agreed deadline
- Manager's Need: Ability to plan dependent activities and meet commitments
- Team Member's Expectation: Flexibility when unforeseen issues arise
- Team Member's Need: Realistic workloads and support when blocked

Resolution Approach: Address both the immediate need (getting the work done) and the systemic need (better planning or communication). Rather than focusing on the missed deadline itself, discuss what would help prevent similar situations in the future.

Scenario 3: The Process Rebel

- Visible Conflict: Team member regularly bypasses established procedures
- Manager's Expectation: Everyone follows the documented process
- Manager's Need: Consistency, quality control, and risk management
- Team Member's Expectation: Efficiency and common sense trump bureaucracy
- Team Member's Need: To work productively without unnecessary obstacles

Resolution Approach: Examine which aspects of the process truly serve the need for quality and risk management, and which might be streamlined. Create a channel for suggesting process improvements so the team member's need for efficiency can help evolve the system rather than being at odds with it.

By focusing on needs rather than expectations, you create space for multiple solutions. Maybe the micromanager can get what they need through a dashboard rather than constant check-ins. Maybe the missed deadline can be mitigated by better early warning systems. Maybe the process can be improved to serve everyone better.

The PB&J Principle: How to Separate Content from Container

Let's return to our PB&J example for a moment. The child's need is nutrition; the expectation is a specific meal. When we confuse the two, we end up with frustration on both sides.

I call this the PB&J Principle: Don't mistake the container (the specific way a need has been met in the past) for the content (the actual need itself).

This principle applies broadly across management situations:

In Feedback

Bad managers say: "You didn't follow the standard format for the client report." Good managers say: "I need to make sure our clients can quickly find the information they need. Let's talk about how your approach meets that need or if we need to adjust."

In Project Planning

Bad managers say: "That's not how we usually approach this kind of project." Good managers say: "Our need is to deliver reliable results efficiently. Talk me through how your approach addresses that."

In Problem-Solving

Bad managers say: "That solution doesn't follow our usual playbook." Good managers say: "What need are we trying to meet, and does this solution effectively address it?"

The PB&J Principle helps you separate habitual methods from actual goals. It keeps you focused on what matters rather than how you've always done things.

Moving from Expectations to Agreements

Expectations, especially unstated ones, often lead to disappointment. Agreements, on the other hand, create clarity and commitment.

As a manager, your job isn't to enforce your expectations, but to facilitate agreements that meet everyone's needs.

Here's how that might work in practice:

1. Identify Underlying Needs

Start with yourself. What do you actually need from your team? Not how you want them to work, but what outcomes matter? Then, understand what your team members need to be successful and satisfied.

2. Make Expectations Explicit

Surface assumptions about how work should happen. "I've been expecting X, but I realize I haven't communicated that clearly." Invite team members to share their expectations too.

3. Negotiate Agreements

With needs and expectations on the table, find approaches that meet the core needs of all parties. "Given that we need X and you need Y, could we try approach Z?"

4. Test and Adjust

Treat these agreements as experiments rather than permanent solutions. "Let's try this for two weeks and then check in on how it's working."

5. Focus on the Need When Issues Arise

When something goes wrong, start with the need: "We needed to give the client confidence that their issue was being addressed. What happened?" This keeps the conversation solution-focused rather than blame-oriented.

Real-World Example: How a Good Manager Approaches Issues

Here's how a good manager approaches an issue or gives feedback. The first thing to look for is what they define as the "issue": do they dig deep enough to define their need instead of doubling down on their expectation?

They'll identify what their need is at the most basic level. Instead of the expectation:

"I expect you to respond to clients within 30 minutes"

they see the need:

"I need to have signal that you are supporting your clients."

They'll describe the circumstance where they observed what they interpreted as not meeting their need. Instead of "You didn't respond to PetSmart's urgent request for 6 hours," it could be "PetSmart wrote in at 10am with an urgent ask for more wholesale crickets for their gecko customers. They followed up at noon, and I saw your response come through at 4pm."

They'll work with you to meet both of your needs. Here, they should tell you what outcome would have met their need and ask you what you would need to be able to make that happen:

"Given the urgency expressed by the client, we'd ideally get back to them within a few business hours. Was there anything that blocked you from being able to respond sooner? I want to make sure I have an understanding of the context you were working in."

Lastly, a possible way to make the situation better for you both: you both get your needs met. And this should be paired with validation that the proposed solution works for you, too:

"Okay, cool – let me work on getting some of the more procedural stuff off your plate so you're able to tackle the urgent asks sooner. Always feel free to shoot me a message if you need an assist. Does that sound good on your end?"

This path allows space for you to tell Jeff that in fact you are supporting your clients in a way Jeff might not have visibility into – by not presuming fault, Jeff keeps the door open for a better understanding on their end. Maybe you had a phone call with another

contact at PetSmart. Now the ask is for you to make that clear in your response, so everyone on the thread is aware.

At the core, I want you to take away this: good managers are considerate and work with you to resolve a problem.

Bad managers... do not.

Applying the Needs vs. Expectations Framework to Your Management

Now that we understand the difference between needs and expectations, how do we apply this framework as managers? Here are some practical steps:

1. Audit Your Own Expectations

Make a list of situations where you've felt frustrated with your team. For each one, ask:

- What was my expectation?
- What was the actual need behind it?
- Were there other ways to meet that need?
- Had I clearly communicated my expectation?

2. Practice Needs-Based Communication

When giving instructions or feedback, explicitly state the need:

- "We need to ensure clients feel their concerns are prioritized."
- "We need to maintain accurate financial records for compliance."
- "We need to deliver features that solve real user problems."

Then discuss various ways to meet those needs rather than prescribing a specific approach.

3. Foster Needs Awareness in Your Team

Encourage team members to articulate needs rather than expectations when discussing issues:

- "What do you need to be successful in this project?"
- "What does the client actually need here, beyond what they're asking for?"
- "What team needs might be in conflict in this situation?"

4. Create Systems That Meet Needs Flexibly

Review your team's processes and policies. Do they allow for multiple ways to meet the same need? Or do they rigidly enforce one approach? Look for opportunities to create flexibility without compromising on core needs.

Conclusion: The Liberation of Needs-Based Management

Understanding the difference between needs and expectations is liberating for both managers and their teams. It shifts the focus from compliance to creativity, from procedure to purpose.

When you manage based on needs, you:

- Create space for innovation in how work gets done
- Reduce unnecessary conflicts over methods
- Focus energy on what truly matters
- Build trust through mutual understanding

Most importantly, you move away from the parent-child dynamic that plagues many management relationships ("Do it because I said so") toward an adult-adult dynamic of mutual problem-solving ("Here's what we need; how can we make that happen?").

In the next chapter, we'll explore how this needs-based approach connects to the core management value of learning, creating an environment where both performance and growth can flourish.

CHAPTER 3: Learning as the Core Management Value

Why Great Managers Prioritize Learning Capacity

Remember our friend Frodo? When we helped him refresh his resume to apply for that ring-bearing position with the Fellowship, we didn't just list his tasks—we highlighted his learning journey. We showed how he implemented Hobbiton's event planning process, reducing the lead time from four weeks to one. We demonstrated how he secured a grant to repair Bag End's structural supports.

Why did we focus on these accomplishments? Because they showed that Frodo could identify problems, find novel solutions, and implement them successfully. In other words, they showed he could learn.

The greatest managers I've known share one fundamental belief: the capacity to learn is more valuable than any specific skill or knowledge. This isn't just a nice sentiment—it's a practical recognition of how work actually happens in the 21st century.

Consider the pace of change in most industries:

- Technology platforms evolve constantly
- Customer expectations shift rapidly
- Competitive landscapes transform unexpectedly
- Regulatory environments grow increasingly complex

In this context, what you know today will inevitably become outdated. But your ability to learn—to acquire new skills, adapt to changing circumstances, and integrate new information—never loses its value.

As a manager, when you prioritize learning capacity in your team, you're not just preparing them for today's challenges; you're building resilience for whatever comes next.

Creating Environments That Foster Growth

Learning doesn't happen by accident. As a manager, you need to intentionally create conditions where learning is not just possible but inevitable.

Here's how to build a learning environment for your team:

1. Make Learning Safe

Fear is the enemy of learning. When people are afraid of looking stupid, making mistakes, or being criticized, they default to safe, familiar approaches. They hide their confusion rather than seeking clarification. They avoid risks rather than experimenting with new methods.

Creating psychological safety—the shared belief that team members won't be punished or humiliated for speaking up with ideas, questions, concerns, or mistakes—is the foundation of a learning environment.

In practice, this means:

- Modeling vulnerability yourself: "I don't understand this yet" or "I made a mistake here" are powerful phrases coming from a manager.

- Separating learning from evaluation: Create spaces where exploration is explicitly not being judged.

- Rewarding honesty about mistakes: The team member who says "I messed up, here's what happened" should receive a more positive response than one who hides issues.

When I was building the support team in Utah, one of my first moves was to institute a "Fail of the Week" segment in our team meetings. Each person, including me, would share something that didn't go as planned and what they learned from it. This simple practice normalized failure as part of learning and turned mistakes from sources of shame into valuable team lessons.

2. Provide the Right Challenges

Learning happens at the edge of comfort. Too far inside that edge, and people get bored. Too far outside it, and they get overwhelmed.

As a manager, your job is to calibrate challenges for each team member:

- Stretch assignments: Tasks that push people just beyond their current capabilities.

- Scaffolded learning: Breaking complex skills into manageable pieces with appropriate support.

- Deliberate practice: Opportunities to repeatedly work on specific skills with feedback.

A junior analyst on my team was eager to develop presentation skills but terrified of public speaking. Rather than throwing her into presenting to the executive team (overwhelming) or letting her avoid presentations entirely (unchallenging), we created a progression: first presenting to me alone, then to three colleagues, then to the team, and finally to a client. Each step built confidence and skill.

3. Make Time for Reflection

Experience alone doesn't guarantee learning. Without reflection, people can repeat the same experiences without extracting new insights. As the philosopher John Dewey noted, "We don't learn from experience... we learn from reflecting on experience."

Build reflection into your team's rhythms:

- Project retrospectives: Not just "what happened?" but "what did we learn?"

- Learning journals: Encouraging team members to document insights and questions.

- Dedicated learning time: Blocks on the calendar specifically for skill development.

- Knowledge-sharing sessions: Formats where team members teach each other.

At Affirm, we instituted "Learning Fridays" where team members spent the afternoon on professional development and shared their discoveries the following week. This not only expanded individual knowledge but cross-pollinated ideas across the team.

4. Connect Learning to Purpose

People learn more effectively when they understand why the learning matters. Connect skill development to meaningful outcomes:

- Customer impact: How will this learning help us serve clients better?

- Personal growth: How does this contribute to career development?

- Team capability: How does this make us collectively stronger?

When a team member at the logistics company was hesitant about learning a new database query language, I connected it to her passion for helping customers: "Remember how frustrated you were last week when you couldn't answer that shipping question quickly? This skill would let you find those answers instantly." Suddenly, the abstract technical skill had concrete purpose.

Helping Your Team Learn from Experience

Experience is a powerful teacher, but only if we know how to extract its lessons. As a manager, you can help your team members transform raw experience into actionable insights.

The Experiential Learning Cycle

David Kolb's Experiential Learning Cycle provides a useful framework:

1. Concrete Experience: Having an experience
2. Reflective Observation: Reviewing what happened
3. Abstract Conceptualization: Drawing conclusions
4. Active Experimentation: Trying out what was learned

Too often, teams get stuck at step 1. They have experiences but don't complete the cycle to extract learning and apply it to new situations.

As a manager, you can facilitate this process:

After Success:

- "What went particularly well here?"
- "What factors contributed to this success?"
- "How could we apply these lessons to other areas?"
- "What might have made this even more successful?"

After Failure:

- "What was the gap between expectation and reality?"
- "What assumptions did we make that didn't hold true?"
- "What would we do differently next time?"
- "What early warning signs might we have missed?"

During Ongoing Work:

- "What's surprising you about this project?"
- "What are you learning that might be useful elsewhere?"
- "Where are you feeling stuck, and what might help?"
- "What experiment could we run to test our approach?"

From Individual to Team Learning

Learning becomes exponentially more valuable when it's shared. Create systems for transforming individual insights into team knowledge:

- Documentation: Not just what to do, but why it works

- Case studies: Stories of successes and failures with lessons extracted

- Mentoring relationships: Pairing experienced team members with newer ones

- Communities of practice: Groups that share knowledge around specific domains

When one of my support engineers figured out a complex shipping integration issue, we didn't just celebrate her individual achievement. We had her document the solution, teach others the approach, and update our troubleshooting guide. Her individual learning became a team asset.

The Virtuous Cycle of Reflection and Improvement

Learning isn't a one-time event—it's an ongoing cycle. The most effective teams embed reflection and improvement into their regular work rhythm.

Here's how this might look in practice:

Daily Level

- Brief check-ins: "What did we learn yesterday that might help today?"
- Quick adjustments based on immediate feedback
- Capturing insights while they're fresh

Weekly Level

- Team retrospectives: "What did we learn this week?"
- Sharing individual discoveries
- Planning experiments for the coming week

Monthly/Quarterly Level

- Deeper review of patterns and trends

- Updating processes based on accumulated learning
- Setting learning goals for the next period

Annually

- Comprehensive review of team growth
- Celebration of learning milestones
- Strategic direction for capability development

This cadence creates a virtuous cycle where reflection leads to improvement, which creates new experiences, which prompt further reflection, and so on.

Learning as a Competitive Advantage

In business terms, learning isn't just a nice-to-have—it's a competitive advantage. Organizations that learn faster than their competitors adapt more quickly to market changes, innovate more effectively, and retain top talent more successfully.

As a manager, you're not just responsible for today's results; you're building your team's capacity to deliver tomorrow's results. By prioritizing learning, you're making a strategic investment in future performance.

Consider these competitive benefits of a learning-oriented team:

- Adaptability: When change comes (and it will), your team adjusts quickly

- Innovation: Novel approaches emerge from combining diverse knowledge

- Problem-solving: Complex challenges are met with creative solutions

- Resilience: Setbacks become learning opportunities rather than demotivators

- Attraction and retention: Top performers seek environments where they can grow

During the 2020 pandemic, teams that had cultivated learning agility adapted to remote work more seamlessly than those that relied on rigid processes. The former saw the situation as a challenge to learn from; the latter saw it as a disruption to endure.

Balancing Learning and Performance

Learning and performance can sometimes seem at odds. Learning requires experimentation, which means occasional failure. Performance demands reliability, which can discourage risk-taking.

But this tension is manageable. Here's how to balance learning and performance:

Create Separate Spaces

- Performance zones: Where the primary goal is flawless execution
- Learning zones: Where the primary goal is skill development
- Innovation zones: Where the primary goal is exploring new approaches

Be explicit about which zone applies to different activities.

Set Appropriate Expectations

- "In this client meeting, let's stick to what we know works."
- "In this internal workshop, let's experiment with new approaches."
- "This project has a 70% performance focus and 30% learning focus."

Measure Both Dimensions

- Track performance metrics (results, efficiency, quality)
- Track learning metrics (new capabilities, knowledge spread, problem-solving capacity)
- Recognize achievements in both areas

One of my technical account managers was brilliant with clients but nervous about developing new technical skills. We agreed that client interactions were "performance zones" where she could rely on her strengths, while internal team meetings were

"learning zones" where she could practice technical explanations without fear of judgment.

Conclusion: The Learning Manager

Throughout this chapter, we've focused on how managers can foster learning in their teams. But there's one more critical piece: your own learning journey as a manager.

The learning manager:

- Continuously develops their management approach
- Seeks feedback on their effectiveness
- Experiments with new techniques
- Models the learning mindset they wish to see

Your team will take cues from you. If you treat failures as learning opportunities, admit what you don't know, and visibly work on your own growth, you create permission for them to do the same.

Remember Gandalf? Even after thousands of years of wizarding, he remained curious, adaptable, and willing to learn from those around him—whether they were ancient elves or humble hobbits. That's why he was not just powerful, but wise.

In the next chapter, we'll explore one of the most crucial skills for any manager: the art of feedback. We'll see how the principles of presence of mind, distinguishing needs from expectations, and fostering learning all come together in productive feedback conversations.

CHAPTER 4: The Art of Feedback

Issue vs. Expectation - Digging Deeper

Let me share a story from my days managing the Technical Account Management team at Affirm. One afternoon, I received an escalation from a key client who was frustrated about response times. My initial reaction was to fire off a message to Maria, the team

member responsible: "The client is upset about slow responses. We need to be more responsive."

But before hitting send, I paused. What was the actual issue here? Was it really about response times, or was that just my expectation of how client service should work?

I dug deeper into the client's feedback and discovered something interesting. The client wasn't upset about waiting for responses—they were upset about not knowing when they would get a response. The issue wasn't speed; it was uncertainty. Maria had been prioritizing thorough solutions over quick acknowledgments, and in many cases, that was exactly what clients needed.

This distinction completely changed my approach. Instead of imposing my expectation about response times, we had a conversation about the client's actual need for clarity and predictability. Together, we developed a system where Maria would quickly acknowledge requests with an estimated timeline for resolution.

This story illustrates the first principle of effective feedback: dig deeper than the surface issue to understand what's really happening.

When giving feedback, managers often react to violations of their expectations rather than exploring the underlying needs and circumstances. They focus on the "what" (what happened or didn't happen) rather than the "why" (why it happened that way) and the "how" (how to address the real need going forward).

Effective feedback starts with curiosity rather than judgment. It seeks to understand before being understood.

The Three Phases of Effective Feedback

Feedback isn't a single event—it's a process with distinct phases. When managers rush through or skip phases, feedback becomes less effective and more likely to provoke defensiveness.

Here's a framework for structuring feedback conversations:

Phase 1: Understanding the Situation

This phase is about gathering information and perspective. As a manager, your goal is to create a shared understanding of what happened, including:

- The specific behavior or outcome you observed
- The context in which it occurred
- The team member's perspective and intentions
- The impact on others (clients, teammates, projects)

Key questions in this phase include:

- "Can you walk me through what happened with X?"
- "What factors influenced your approach?"
- "What were you trying to accomplish?"
- "What challenges did you encounter?"

This phase should feel like joint exploration rather than interrogation. You're signaling that you want to understand, not just deliver a verdict.

Phase 2: Exploring Options and Implications

Once you have a shared understanding of the situation, the focus shifts to what could have been done differently and why it matters.

This phase includes:

- Discussing alternative approaches
- Examining the implications of different choices
- Connecting the situation to broader goals and principles
- Identifying patterns that might extend beyond this specific instance

Key questions might include:

- "What other approaches did you consider?"
- "How might this approach impact our client relationship long-term?"
- "Where else might this pattern show up in our work?"
- "What would help you navigate similar situations in the future?"

This phase bridges understanding and action. It helps team members develop judgment rather than just following prescribed behaviors.

Phase 3: Moving Forward

The final phase focuses on concrete next steps and support.

This includes:

- Clear expectations for future situations
- Resources or support needed
- How progress will be measured
- When you'll follow up

Key elements might include:

- "For similar situations going forward, let's agree that you'll..."
- "What resources or support would help you implement this approach?"
- "I'll check in with you next month to see how this is working."
- "What questions do you have about this approach?"

This phase ensures feedback translates into action rather than just becoming an interesting discussion.

Taking the Wind Out of Conflict

One of the most challenging aspects of feedback is managing the emotional dimension. When people feel criticized or threatened, their defensive reactions can derail even the most well-intended feedback.

Here's where the concept of "taking the wind out of their sails" comes in—not to disempower people, but to defuse defensiveness before it escalates.

The Approach: Listen, Echo, Ask

When you notice defensiveness emerging, try this sequence:

1. Listen fully to the person's response without interrupting

2. Echo back what you heard to confirm understanding
3. Ask a question that invites deeper reflection

For example:

Team member (defensively): "I was following the process exactly as documented! No one told me there was a different expectation."

Manager (taking the wind out): "I hear that you were following the documented process and weren't aware of any other expectations. That makes sense. (Pause) I'm curious—what impact do you think this approach had on the client's experience?"

This approach accomplishes several things:

- It validates the person's perspective
- It creates space for them to feel heard
- It gently redirects the conversation toward impact rather than intent
- It maintains focus on learning rather than blame

When Sauron unleashed his wrath on poor Frodo through the One Ring's Slack integration, what made the situation worse was that Sauron didn't take time to understand Frodo's perspective. He didn't ask why Frodo showed kindness to Smeagol. Had he done so, he might have learned about Gandalf's insight that Smeagol had a role to play—information that would have been strategically valuable to Sauron!

Instead, Sauron's flames of criticism provoked Frodo's defensiveness and resistance—ultimately leading to the ring's destruction. Not the management outcome Sauron was hoping for.

The Power of Genuine Curiosity

The secret to taking the wind out of conflict isn't technique—it's genuine curiosity. When you're authentically interested in understanding rather than proving your point, people sense it and respond differently.

Some questions that signal genuine curiosity:

- "What factors went into your decision?"

- "How did you see this situation?"
- "What were you trying to accomplish?"
- "What would have helped you approach this differently?"

Notice that none of these questions start with "Why did you..."—a phrasing that often triggers justification rather than reflection.

Documentation as Protection and Growth Tool

Documentation plays a crucial but often misunderstood role in feedback. Many managers view documentation solely as protection against future HR issues—a paper trail in case termination becomes necessary.

While that protective function is real, documentation serves an even more important purpose: it's a tool for growth and clarity.

Types of Feedback Documentation

Effective documentation can take several forms:

1. Shared Meeting Notes

After a feedback conversation, send a brief summary:

- "Thanks for our discussion today. As we discussed, going forward you'll..."
- "The key takeaways I heard were... Did I miss anything important?"
- "I'm looking forward to seeing how the approach we discussed works in practice."

This creates a shared record without the formality of a performance improvement plan.

2. Progress Tracking

Document progress toward agreed-upon goals:

- "In our last three check-ins, I've noticed significant improvement in..."
- "The client specifically mentioned how much they appreciated your..."
- "We're still seeing challenges with... Let's discuss approaches."

This turns documentation into a record of growth rather than just problems.

3. Context Capture

Document relevant context that influenced decisions:

- "We're prioritizing thoroughness over speed due to the compliance requirements of this project."
- "Given the team's current capacity, we're focusing on these three areas first."
- "The market conditions have shifted our strategy toward..."

This helps everyone understand why certain approaches were chosen at particular times.

Documentation Best Practices

To make documentation a positive rather than punitive tool:

- Focus on behaviors and outcomes, not character: "The report was submitted after the deadline" rather than "You're consistently late."

- Include both strengths and areas for growth: "Your analysis was thorough and insightful. Going forward, we need to work on delivering it within the agreed timeframe."

- Document agreements and next steps clearly: "We agreed that you'll provide project updates every Tuesday and Friday."

- Invite the team member's input on the documentation: "I've summarized our discussion—please let me know if I've missed anything or if you have a different perspective to add."

When I managed the support team in Utah, I implemented "coaching logs" that team members could contribute to. After feedback sessions, both the manager and team member would add notes about what was discussed and agreed upon. This shared

ownership transformed documentation from something done to people into something done with them.

The Feedback Conversation Template

Putting all these principles together, here's a template for structuring effective feedback conversations:

1. Set the Stage

- Choose an appropriate time and private setting
- Start with the purpose: "I'd like to discuss..."
- Signal partnership: "My goal is for us to find a way forward that works for everyone."

2. Share Your Observation

- Describe the specific behavior or outcome you observed
- Stick to facts rather than interpretations
- Connect to impact: "Here's how this affected..."

3. Invite Their Perspective

- "I'd like to understand your view of the situation."
- Listen fully without interrupting
- Ask follow-up questions to deepen understanding

4. Explore the Gap

- Identify the gap between what happened and what was needed
- Focus on needs rather than expectations
- Discuss factors that contributed to the gap

5. Co-Create Solutions

- "How might we approach this differently in the future?"
- Offer suggestions as options to consider, not commands

- Agree on specific next steps

6. Express Confidence and Support

- "I'm confident you can make this adjustment."
- "What support do you need from me?"
- "Let's check in on [date] to see how this is working."

7. Document Key Points

- Send a brief follow-up summarizing the conversation
- Include agreed-upon actions and timeframes
- Invite additions or corrections to your summary

This structure balances clarity with compassion, accountability with support.

Different Types of Feedback for Different Situations

Not all feedback situations are the same. The approach you take should vary based on the context and relationship.

For New Team Members

- More frequent, lower-stakes feedback
- Greater emphasis on context and reasoning
- Clear connections to broader principles
- Recognition of the learning curve

"I notice you're formatting client emails differently than our standard approach. Let me explain why we've found this format works well with our clients. For this week, could you try using this template? We can discuss how it feels after you've had a chance to use it."

For Experienced Team Members

- More collaborative exploration
- Greater focus on patterns rather than isolated incidents

- Connection to career growth goals
- Invitation to co-create approaches

"I've noticed a pattern in the last few client interactions where technical details were emphasized over business outcomes. Given your interest in moving toward more strategic roles, what are your thoughts on how we might adjust this balance?"

For Performance Issues

- Greater clarity about expectations and consequences
- More specific measurement of improvement
- More structured follow-up
- Clearer documentation

"We need to address the missed deadlines on the last three reports. This is impacting our team's commitments to other departments. I need to see consistent on-time delivery over the next month. Let's discuss what's causing these delays and what needs to change."

For High Performers

- Focus on stretch opportunities
- More subtle refinements
- Broader strategic considerations
- Peer-level discussions

"Your technical implementation was flawless. I'm curious about how you thought about the training handoff to the client team. What if we approached knowledge transfer as part of the design process rather than as a final step?"

When Feedback Isn't Working

Sometimes, despite your best efforts, feedback doesn't lead to change. Before assuming the person is resistant or incapable, consider these potential barriers:

1. Unclear Expectations

The person doesn't fully understand what's being asked or why it matters.

Solution: Check for understanding by asking them to articulate the expectation in their own words. Connect the feedback to specific examples and outcomes.

2. Skill Gaps

The person wants to improve but lacks the necessary skills.

Solution: Break the desired behavior into component skills. Provide training, resources, or mentoring for specific skill gaps.

3. Competing Priorities

The person is focusing on other areas they believe are more important.

Solution: Clarify priorities explicitly. Discuss trade-offs and how various responsibilities should be balanced.

4. Environmental Barriers

Systems, processes, or resources are preventing the desired behavior.

Solution: Examine the environment in which the person works. Remove obstacles or adjust expectations based on constraints.

5. Misaligned Incentives

What you're asking conflicts with how the person is measured or rewarded.

Solution: Align formal and informal incentives with the behaviors you want to see.

6. Fundamental Misfit

The role requires capabilities or values that don't align with the person.

Solution: Consider whether a different role would better fit their strengths. If not, be honest about the gap and what it means for their future with the team.

When I managed at Affirm, an analyst on my team consistently missed documentation deadlines despite repeated feedback. Instead of escalating consequences, I sat down with him to really understand the barrier. It turned out he was a perfectionist who struggled to consider documentation "complete" enough to submit. Once we identified this underlying issue, we set up a system where he would submit a "first draft" for review rather than a "final document"—removing the psychological barrier while still getting the work done on time.

Conclusion: Feedback as a Gift

When done well, feedback is one of the greatest gifts you can offer as a manager. It helps people grow, improves results, and strengthens relationships.

The key elements we've discussed—digging deeper than expectations, following the three phases, taking the wind out of conflict, using documentation effectively, and adapting your approach to different situations—all serve to make feedback more constructive and less threatening.

Remember that feedback is a skill that improves with practice. Each conversation is an opportunity to refine your approach and build trust with your team.

In the next chapter, we'll explore another critical management skill: setting boundaries. We'll discuss how to establish healthy limits that protect both you and your team, and how to recognize when it's time to make a change.

CHAPTER 5: Boundaries and When to Set Them

The Two Outcomes of Setting Boundaries

Let me tell you about Boromir (not his real name, obviously). He reached out to me when he felt dissatisfied with his work situation, experiencing a growing sense that his ideas were being sidelined, a distance from his peers and management. All this

culminated in him feeling dread when he worked: if the work he was doing wasn't rewarding, and the group he was working with didn't make him feel valued, where was this going?

Boromir was facing a classic boundaries issue. He had been going above and beyond for his organization, but as they saw his willingness to stretch, they asked for more and more without offering additional support or acknowledgment. The cycle was unsustainable, and Boromir knew something needed to change.

This brings us to a fundamental truth about boundaries in the workplace: When you set a reasonable boundary, there are only two possible outcomes:

1. The person or organization respects the reasonable boundary

    - You are able to find a solution together
    - The relationship improves through mutual respect
    - A new equilibrium is established that works for everyone
2. The person or organization does not respect the reasonable boundary

    - This reveals that the workplace is not one where you can maintain reasonable boundaries
    - The inevitable conclusion is that this is not a healthy environment for you
    - You now have clarity about the situation, painful as it may be

There is not a third option. Many of us, like Boromir, convince ourselves that if we could just change how we feel about the boundary violations—if we could somehow alter our perspective, start doing yoga, or develop thicker skin—maybe we could get by without having to set the boundary at all.

This very understandable desire—a desire that we all have at times—is unfounded. The solution is never to ignore your gut and stifle those feelings. The solution must always start with asking yourself: Why does this situation make me feel this way?

How to Communicate Boundaries Effectively

Setting boundaries effectively requires clarity, confidence, and care. Here's a framework for communicating boundaries in professional settings:

1. Clarify Your Own Boundary First

Before you can communicate a boundary to others, you need to be clear with yourself about what it is. Ask yourself:

- What specific behavior or situation am I uncomfortable with?
- Why does this matter to me? (connecting to your values or needs)
- What would a reasonable alternative look like?
- Is this truly a boundary, or just a preference?

True boundaries are connected to your wellbeing, values, or fundamental needs. They're not just preferences about how you'd like things to be.

For example, "I need uninterrupted focus time to complete complex tasks effectively" is a boundary rooted in your ability to perform your job. "I prefer meetings in the morning rather than afternoon" might just be a preference unless there's a deeper need behind it.

2. Choose the Right Time and Place

Boundary conversations deserve proper attention. Choose a setting that provides:

- Privacy
- Sufficient time for discussion
- Minimal distractions
- A neutral emotional atmosphere (not in the heat of frustration)

A one-on-one meeting is usually better than a team setting. A scheduled conversation is usually better than an ambush.

3. Use Clear, Direct Language

Boundaries get murky when we hedge, apologize excessively, or use vague language. Aim for statements that are:

- Specific about the behavior or situation
- Clear about your position
- Connected to legitimate business or professional concerns
- Solution-oriented

Compare these approaches:

Ineffective: "I kind of feel like maybe I'm getting too many after-hours messages? I don't know, it's probably fine, but sometimes it's a bit much..."

Effective: "I've noticed I'm receiving work messages throughout the evening and weekends. To maintain my focus and prevent burnout, I won't be responding to non-emergency messages outside of business hours. For true emergencies, please call me directly."

Notice that the effective version:

- Identifies the specific issue
- Explains the professional rationale
- States the boundary clearly
- Offers an alternative for legitimate exceptions

4. Focus on Mutual Benefit

Frame boundaries as solutions that benefit everyone, not just protections for yourself. Connect your boundary to team or organizational goals:

- "To ensure I can give clients my full attention during meetings..."
- "To maintain the quality of my work and meet our accuracy targets..."
- "To build a sustainable pace that allows our team to perform consistently..."

When Gandalf reached out to the essence of light and fire about reducing his workload, he didn't just say "I want to work less." He framed it in terms of mutual benefit: "I want to work with you to see how we can reduce my scope and make it possible for me to take more time away from the battlefield."

5. Be Prepared for Testing

When you establish a new boundary, expect it to be tested—not necessarily out of malice, but because old habits die hard. Have a plan for how you'll respond to boundary violations:

- A gentle reminder: "As we discussed, I'm not checking email after 6pm."
- Restating the boundary: "I need to stick with our agreement about meeting agendas."
- Enforcing consequences: "Since we don't have an agenda for this meeting, I'll need to excuse myself."

Consistency matters. A boundary that you enforce sometimes but not others isn't really a boundary—it's a suggestion.

Recognizing Toxic Workplace Dynamics

Not all workplace challenges are created equal. Some represent normal friction that can be addressed through boundary-setting. Others reveal toxic patterns that may not be fixable.

Here are some warning signs that you're dealing with a toxic workplace rather than normal organizational challenges:

1. Pattern of Disrespect for Boundaries

Healthy organizations might occasionally overstep boundaries, but they correct course when these issues are raised. Toxic workplaces show a pattern of ignoring or dismissing reasonable boundaries, even after they've been clearly communicated.

Signs include:

- Managers who consistently schedule meetings during stated focus time
- Teams that expect off-hours availability despite explicit boundaries
- Leaders who dismiss concerns about workload or scope creep

2. Punishment for Boundary-Setting

In toxic environments, those who set boundaries face retaliation, whether overt or subtle:

- Being labeled "not a team player"
- Exclusion from opportunities or information
- Critical performance reviews that reference availability or flexibility
- Mockery or dismissal of reasonable needs

3. Inconsistent Standards

Different standards apply to different people without legitimate business reasons:

- Some team members can set boundaries while others cannot
- Leaders don't follow the boundaries they set for their teams
- "Emergency" exceptions become the norm rather than the exception

4. Glorification of Unhealthy Behaviors

The culture celebrates behaviors that harm wellbeing:

- "Hustle culture" that prizes overwork
- War stories about all-nighters or missed family events
- Treating basic self-care as weakness
- Equating presence with productivity

5. Gaslighting About Conditions

When issues are raised, the organization denies reality:

- "That's just how it is in this industry."
- "No one else seems to have a problem with this."
- "You misunderstood our expectations."
- "We've always been supportive of work-life balance." (while actions show otherwise)

Boromir's workplace showed many of these signs. His ideas were consistently sidelined. When he raised concerns about workload, he was told everyone was

"tightening their belts" temporarily—but the temporary crunch never ended. Meanwhile, he watched senior leaders maintain boundaries that junior staff couldn't.

When It's Time to Leave

Sometimes, despite your best efforts to set and maintain boundaries, it becomes clear that a workplace is fundamentally misaligned with your needs and values. Recognizing when it's time to move on is an essential skill for long-term career health.

You've been together for years at this point. You thought it would last forever. When you started, everything seemed so nice: they gave and gave, so you felt compelled to give in return, even when they didn't ask. But they did ask, and the asks kept coming. Maybe it came from a place of wonder. If you could give so much, maybe there was no limit. Maybe you could do it all.

But you couldn't. Not because of a fault of yours, but you're human. You do have limits. And you need more than lip service.

Over time, it became clear: you weren't going to get your needs met the way you needed. And you tried talking to them, you tried having a genuine conversation about what you need. But they told you it's just crunch time, and we all gotta put in a little more right now. Budgets are tight, we're all tightening our belts and feeling the squeeze a bit, but really, truly it'll just be for peak season.

But peak season came and went, and it was more of the same. So you decided it was time you went, too.

Signs It's Time to Move On

1. You've clearly communicated boundaries, but they're consistently violated One violation might be a mistake. A pattern of violations reveals a fundamental lack of respect or a significant misalignment in expectations.
2. Your physical or mental health is suffering Persistent stress, anxiety, sleep disruption, or physical symptoms that correlate with work are serious warning signs. Your body often recognizes an unhealthy situation before your conscious mind does.

3. You've stopped growing If you're no longer learning, developing new skills, or being challenged in positive ways, you may have reached the limits of what this environment can offer you.
4. You've become someone you don't recognize When you find yourself regularly compromising your values, speaking or acting in ways that don't align with your authentic self, or feeling ashamed of your workplace behavior, it's a sign the environment is changing you—and not for the better.
5. You've tried to make it work, but nothing changes You've had the conversations. You've proposed solutions. You've given reasonable timeframes for improvement. And yet, the same issues persist.

Boromir recognized these signs. Despite his attempts to establish boundaries around workload and to have his ideas valued, the pattern continued. When all was said and done, Boromir felt like the only option he had left was to find another team.

How to Leave Well

Once you've decided to leave, how you depart matters—both for your professional reputation and for your own sense of closure.

1. Confirm Your Decision

Before taking irreversible steps, ensure you're making a deliberate choice rather than reacting to a temporary frustration:

- Review your documentation of boundary violations
- Consult trusted mentors or friends outside the situation
- Consider whether there are any unexplored solutions
- Assess your financial readiness for a transition

2. Prepare Before Announcing

Get your affairs in order before giving notice:

- Secure another position if possible
- Build up savings if needed
- Document your accomplishments and projects

- Gather contacts you want to maintain
- Copy personal files (but nothing proprietary)

3. Be Professional in Your Exit

How you leave creates a lasting impression:

- Give appropriate notice as defined by your contract or norms
- Create thorough transition documentation
- Offer to train your replacement if timing allows
- Express gratitude for positive aspects of your experience
- Avoid burning bridges—the industry is smaller than you think

4. Be Honest But Strategic in Exit Interviews

Exit interviews present an opportunity for constructive feedback, but they're not therapy sessions:

- Focus on systemic issues rather than personal grievances
- Provide specific examples rather than general complaints
- Suggest improvements that could help others
- Remember that your comments may not remain confidential
- Prioritize what would be most helpful for the organization to hear

5. Process the Experience

After leaving, take time to reflect and learn:

- What boundaries will you establish earlier in your next role?
- What questions will you ask in future interviews to identify similar issues?
- What did you learn about your own needs and values?
- How might you approach similar situations differently in the future?

When Boromir left his fellowship for a new opportunity (rumor has it he was considering Twilio), he did so with professionalism. He provided a full month's notice, created detailed documentation about his responsibilities, and focused his exit interview on constructive suggestions rather than complaints. This approach preserved relationships and his professional reputation.

Setting Boundaries as a Manager

So far, we've primarily discussed boundaries from an individual contributor's perspective. But as a manager, you have a dual responsibility: setting your own boundaries and creating an environment where your team can set healthy boundaries too.

Setting Your Own Boundaries as a Manager

Managers often face unique boundary challenges:

- Expectations of constant availability
- Pressure to shield the team from organizational dysfunction
- Blurred lines between supporting team members and maintaining appropriate distance
- Difficulty separating your performance from the team's performance

Effective manager boundaries might include:

- Clear communication channels for different urgency levels
- Defined response times for different types of issues
- Protected time for strategic work and professional development
- Emotional boundaries around taking responsibility for team members' feelings

When I managed the Technical Account Management team at Affirm, I established clear boundaries around after-hours contact. I created three tiers:

- True emergencies: Call my cell anytime
- Urgent but not emergencies: Text message during waking hours
- Everything else: Email or Slack message to be addressed during work hours

This system gave the team clarity about when and how to reach me, while preserving my personal time for sustainability.

Creating a Boundary-Healthy Team Culture

Beyond your own boundaries, you shape how boundary-setting is perceived and practiced on your team:

1. Model Healthy Boundaries

Your actions speak louder than words:

- Demonstrate respect for your own boundaries
- Acknowledge when you need time to think or focus
- Take your vacation time and truly disconnect
- Be transparent about your boundary-setting process

2. Respect Team Members' Boundaries

Your response to others' boundaries sets the tone:

- Honor focus time blocks in calendars
- Ask about communication preferences
- Avoid sending non-urgent messages outside work hours
- Acknowledge and address boundary violations when they occur

3. Create Explicit Systems for Boundaries

Build boundary-setting into your team operations:

- Establish team agreements about meetings, communication, and availability
- Create clear escalation paths for different scenarios
- Define what constitutes a true emergency
- Revisit and revise these systems regularly

4. Recognize and Reward Boundary-Setting

What gets recognized gets repeated:

- Acknowledge when team members appropriately maintain boundaries
- Highlight how boundaries contribute to sustainable performance
- Address boundary violations as learning opportunities
- Make appropriate boundary-setting part of performance discussions

5. Protect Your Team's Boundaries

Act as a buffer between your team and the broader organization:

- Push back on unreasonable demands from other departments
- Negotiate realistic deadlines and expectations
- Communicate your team's capacity constraints clearly
- Advocate for resources when workload consistently exceeds capacity

At the logistics company, I implemented "Focus Fridays" for my team—a day with no internal meetings and limited client meetings. I had to regularly defend this practice to other departments who wanted access to my team members on Fridays. By consistently protecting this boundary, I demonstrated its importance and created space for deep work that improved overall team performance.

Boundaries in Special Circumstances

Some workplace situations require specialized boundary approaches:

Remote Work Boundaries

With the rise of remote and hybrid work, boundary issues have evolved:

- Physical boundaries between work and home are blurred
- Digital accessibility creates pressure for constant availability
- Video meetings create new forms of boundary-crossing

Effective remote work boundaries might include:

- Defined working hours communicated to your team
- Physical separation between work and living spaces when possible
- Rituals that mark the beginning and end of the workday
- Camera-off policies for meetings where video isn't necessary
- Regular breaks scheduled into your calendar

Career Transition Boundaries

When changing roles or organizations, boundaries help manage the transition:

- Clear timing for ending previous responsibilities
- Limits on availability to the former team after transition
- Scope boundaries for the new role during the learning phase
- Transparent communication about capacity during the transition period

Boundaries for Organizational Dysfunction

Sometimes boundaries are needed to protect yourself from wider organizational issues:

- Information boundaries around toxic company politics
- Engagement boundaries with chronically dysfunctional processes
- Emotional boundaries with leaders who behave erratically
- Time boundaries when chaos threatens to consume all available hours

Boundaries During Organizational Change

During mergers, restructures, or leadership changes, boundaries become especially important:

- Clarity about your decision-making authority in uncertain times
- Limits on speculation and rumor engagement
- Protection of your team from unnecessary anxiety
- Preservation of core work despite organizational distractions

Gandalf faced this situation when considering his "retirement" plan. He didn't want to stop working entirely but needed to establish new boundaries around when and how he worked. By clearly articulating his needs and proposing specific adjustments, he created a framework for negotiation that respected both his needs and the organization's.

The Evolution of Boundaries Throughout Your Career

As your career evolves, so too will your boundaries. What works at one stage may not serve you at another.

Early Career

New professionals often focus on proving themselves and may have fewer rigid boundaries. However, even at this stage, basic boundaries around respect, safety, and ethical behavior are essential.

Early career boundaries might include:

- Protection of learning time to build skills
- Limits on responsibility beyond capability or authority
- Basic work-hour parameters with flexibility for occasional stretches

Mid-Career

As you establish expertise and credibility, boundary-setting often shifts toward sustainability and effectiveness.

Mid-career boundaries might include:

- More defined separation between work and personal time
- Clearer scope boundaries around role and responsibilities
- Strategic boundaries that protect your most valuable contributions
- Systems that scale your impact without requiring constant personal involvement

Senior Career

At senior levels, boundaries often focus on maximizing unique value and legacy.

Senior career boundaries might include:

- Delegation of activities that don't require your specific expertise
- Protection of strategic thinking time
- Selective engagement based on impact potential
- Boundaries that create space for mentoring and knowledge transfer

When Gandalf approached the essence of light and fire about changing his work arrangements, he was in this senior career phase. After millennia of service, he needed boundaries that acknowledged his experience while creating space for personal

priorities. His request wasn't about working less hard, but about working differently in a way that honored his contributions while creating sustainability.

Conclusion: Boundaries as an Act of Service

We often think of boundaries as self-protective, and they certainly can be. But at their best, boundaries are an act of service—to yourself, your team, and your organization.

When you set clear boundaries:

- You bring your best self to your work rather than a depleted version
- You model sustainable practices for others, especially those who look to you as an example
- You create clarity that helps others engage with you more effectively
- You contribute to a culture where everyone can do their best work without burning out

The manager who maintains healthy boundaries isn't selfish—they're demonstrating what sustainable excellence looks like. They're creating conditions where people can thrive long-term rather than flame out in spectacular but short-lived bursts.

As you continue your management journey, remember Boromir's realization: there are only two outcomes when you set reasonable boundaries. Either they're respected, creating a foundation for a healthy working relationship, or they're consistently violated, revealing a fundamental misalignment that requires a change.

Either way, clarity emerges—and clarity, even when painful, is always preferable to the limbo of undefined expectations and unmet needs.

In the next chapter, we'll explore how to apply these boundary principles across your organization through effective management of relationships up, down, and across the hierarchy.

CHAPTER 6: Managing Up, Down, and Across

Building Trust with Leadership

In the halls of Mordor, amidst the fiery chaos of Mount Doom, even Sauron had a boss (metaphorically speaking, of course). Whether your organization resembles the idyllic Shire or the more structured hierarchy of Gondor's court, one thing remains constant: your effectiveness as a manager depends not just on how you lead your team, but on how you manage your relationship with leadership.

Managing up—working effectively with those who have authority over you—is perhaps the most misunderstood management skill. Many confuse it with political maneuvering or simple obedience. In reality, it's about creating a productive two-way relationship that serves your team, your leadership, and the organization's goals.

The Foundation: Understanding Their World

Effective upward management starts with perspective-taking. Your leadership faces pressures, constraints, and priorities that may not be immediately visible from your position.

To build this understanding:

1. Study Their Context

- What metrics are they evaluated on?
- What pressures come from their bosses or stakeholders?
- What keeps them up at night?
- What past experiences shape their approach?

Think of this as reconnaissance rather than mind-reading. You're gathering information that helps you communicate more effectively.

When I was managing at the logistics company, I noticed our VP of Operations would tense up whenever project timelines expanded. Rather than assuming he was simply impatient, I learned that he was under quarterly pressure from investors to demonstrate progress. This insight completely changed how I communicated timeline adjustments—always pairing them with concrete milestones we could report in the interim.

2. Identify Their Communication Preferences

- Do they prefer data or stories?
- Written briefs or verbal updates?
- Detailed analysis or executive summaries?
- Scheduled meetings or informal check-ins?

These aren't rigid categories, but understanding tendencies helps you present information in ways that resonate.

At Affirm, I worked with a director who rarely read lengthy emails but absorbed information quickly in person. I adjusted by sending brief bulleted previews followed by in-person discussions for anything requiring her input.

3. Recognize Their Decision-Making Style

- Are they intuitive or analytical?
- Do they prefer options or recommendations?
- How much supporting evidence do they need?
- How do they weigh different types of risks?

This knowledge helps you structure recommendations in ways that facilitate good decisions.

Creating Value Through Information Flow

Once you understand leadership's context, you can create value through strategic information management:

1. Filter and Prioritize

Your role is not to pass along every piece of information, but to provide what's most relevant:

- Filter out noise that doesn't require their attention
- Prioritize issues that need their awareness or decision
- Frame information in terms of strategic priorities
- Connect team activities to organizational goals

Think of yourself as a translator between your team's detailed work and the broader organizational context.

2. Bring Solutions, Not Just Problems

The way you present challenges shapes how leadership responds:

Instead of: "Client X is unhappy with our implementation timeline." Try: "Client X has concerns about our implementation timeline. After reviewing their needs and our capacity, I see three options we could consider..."

This doesn't mean hiding problems—transparency is crucial. But packaging problems with potential solutions demonstrates initiative and makes it easier for leaders to help.

3. Provide Context, Not Just Updates

Status updates gain value when framed within broader context:

Instead of: "Project Y is 80% complete." Try: "Project Y is 80% complete, which puts us on track to meet the quarterly goal of expanding our enterprise client base. The team overcame a significant integration challenge this week by..."

This approach helps leadership connect your work to organizational priorities and gives them relevant points to share in their own upward communication.

Managing Expectations Proactively

One of the most valuable skills in managing up is proactive expectation management:

1. Set Realistic Expectations Early

It's tempting to promise what you think leadership wants to hear. Resist this urge. Instead:

- Provide honest assessments of what's achievable
- Identify potential risks or constraints upfront
- Suggest alternatives when requests seem unrealistic
- Underpromise and overdeliver rather than the reverse

2. Provide Regular Updates

Surprises are rarely welcome in business settings:

- Establish a rhythm of regular communication
- Flag potential issues before they become problems
- Update timelines when circumstances change
- Share wins and progress, not just challenges

3. Manage Your Commitments

Your credibility depends on reliability:

- Be judicious about what you commit to
- Track commitments meticulously
- Communicate proactively if you can't deliver
- Acknowledge and learn from missed commitments

When Gandalf approached the essence of light and fire about changing his work arrangement, he embodied these principles. He didn't simply make demands but presented a thoughtful proposal that acknowledged both his needs and the organization's. He anticipated questions and prepared responses. He suggested a transition plan that would minimize disruption.

Creating Autonomy for Your Reports

Now let's turn our attention downward. If managing up is about working effectively with those who have authority over you, managing down is about how you exercise authority responsibly with your team.

The most effective managers create appropriate autonomy for their team members. This isn't about abandoning them to figure things out alone, but about finding the right balance between guidance and freedom.

Assessing Readiness for Autonomy

Not every team member needs the same level of autonomy. Consider these factors:

1. Technical Capability

- Do they have the skills to execute without detailed direction?
- Where are they on the learning curve for specific tasks?
- What technical support might they need?

2. Judgment Maturity

- Do they consistently make sound decisions in their area?
- Can they anticipate problems and address them proactively?
- Do they know when to escalate issues versus handle them independently?

3. Alignment Understanding

- Do they understand the team's goals and priorities?
- Can they connect their work to broader organizational objectives?
- Do they grasp the reasoning behind strategic decisions?

4. Feedback Responsiveness

- How do they incorporate feedback into their work?
- Can they self-correct based on results?
- Do they seek input appropriately?

These factors help you determine the appropriate level of autonomy for each person, which may vary by task or project.

The Delegation Spectrum

Effective delegation exists on a spectrum, from highly directed to highly autonomous:

Level 1: Direct Instruction

"Here's exactly what to do and how to do it."

- Appropriate for: New team members, crisis situations, highly regulated processes
- Manager role: Provide detailed guidance and close oversight
- Team member role: Follow instructions carefully, ask clarifying questions

Level 2: Guided Execution

"Here's what we need to accomplish. I suggest this approach, but let me know if you see issues."

- Appropriate for: Developing team members, complex projects with some flexibility
- Manager role: Outline objectives and suggested approach, remain available for support
- Team member role: Follow general approach with some adaptation, flag significant concerns

Level 3: Outcome Direction

"Here's what we need to accomplish. How do you think we should approach it?"

- Appropriate for: Experienced team members, projects where multiple approaches could work
- Manager role: Clearly define desired outcomes, provide constraints or considerations
- Team member role: Develop approach, seek input on key decisions, provide progress updates

Level 4: Problem Assignment

"Here's a challenge we're facing. I'd like you to own developing a solution."

- Appropriate for: Highly capable team members, innovation needs, developmental opportunities

- Manager role: Frame the problem clearly, provide context, establish boundaries
- Team member role: Define approach, develop and implement solution, keep manager informed

Level 5: Domain Ownership

"This area is yours to own. Let me know how I can support you."

- Appropriate for: Senior team members, areas where specialized expertise exceeds your own
- Manager role: Set broad expectations, provide resources, remove obstacles
- Team member role: Proactively manage entire domain, involve manager at strategic points

The art of delegation lies in matching the right level to each person and situation. The goal is to delegate at the highest level the team member can handle successfully—providing enough support to prevent failure but enough autonomy to foster growth.

Setting Up for Success

Regardless of the delegation level, these elements help create successful autonomy:

1. Clear Expectations

Team members need to understand:

- What success looks like
- Any constraints or parameters
- Timelines and milestones
- How their work connects to larger goals

2. Appropriate Resources

Autonomy without adequate resources sets people up for failure:

- Access to necessary information
- Required tools and systems

- Budget or time allocations
- Subject matter experts or collaborators

3. Supportive Availability

Your accessibility shapes how autonomy functions:

- Regular check-ins at appropriate intervals
- Open-door policy for questions or concerns
- Clear escalation paths for urgent issues
- Psychological safety to admit struggles

4. Balanced Feedback

Both positive reinforcement and constructive guidance are essential:

- Recognition of progress and achievements
- Timely course-correction when needed
- Focus on learning rather than criticism
- Increasing autonomy as capability grows

When I managed the support team in Utah, I deliberately moved team members through these autonomy levels as they developed. New hires started with direct instruction on customer interactions, then progressed to guided execution where they could adapt responses while following templates. As they demonstrated sound judgment, they moved to outcome direction, where they owned the entire customer interaction with minimal oversight.

The most rewarding moment came when several team members reached the problem assignment level and began developing new approaches to customer issues I hadn't even identified. Their autonomy didn't diminish my role—it elevated it from directing day-to-day activities to fostering innovation and growth.

Cross-Functional Collaboration Without the Drama

Now let's expand our view to managing across—working effectively with peers and partners who don't fall in your direct line of authority. This is where many managers struggle, as the lack of formal authority requires a different approach.

The Challenge of Lateral Relationships

Cross-functional collaboration comes with inherent tensions:

- Different priorities and metrics
- Competing demands for limited resources
- Varied professional languages and perspectives
- Unclear decision rights and responsibilities

These tensions can lead to delays, conflicts, and suboptimal outcomes. Managing across effectively means navigating these challenges without the convenience of hierarchical authority.

Building Collaborative Capital

The foundation of effective lateral management is what I call "collaborative capital"—the goodwill and mutual benefit that makes others want to work with you even when they don't have to.

1. Invest Before You Need Returns

Build relationships during calm periods, not just when you need something:

- Learn about others' priorities and challenges
- Offer help that benefits their objectives
- Acknowledge and celebrate their successes
- Demonstrate reliability in small interactions

At Affirm, I made it a practice to meet quarterly with peer managers from product, engineering, and sales teams—not to discuss specific projects, but to understand their world. These relationships proved invaluable when urgent cross-functional needs arose.

2. Speak Their Language

Each function has its own priorities and terminology:

- Frame requests in terms of their objectives
- Translate your needs into their professional language
- Acknowledge their constraints and concerns
- Find mutual wins rather than zero-sum propositions

For example, when working with the finance team on budget approvals, I learned to translate customer experience improvements into revenue retention metrics. Same goal, different language.

3. Create Clarity Around Expectations

Ambiguity breeds frustration in cross-functional work:

- Document agreements about responsibilities
- Establish clear timelines and dependencies
- Define what "done" looks like for each party
- Set explicit communication expectations

Navigating Cross-Functional Decisions

Decision-making across functions often becomes a sticking point. These frameworks help create clarity:

1. RACI Matrix

For complex initiatives, define:

- Responsible: Who does the work
- Accountable: Who must approve or sign off
- Consulted: Who provides input before decisions
- Informed: Who needs to know after decisions

This clarifies roles without endless meetings where everyone feels they need to weigh in on everything.

2. Decision Levels

Not all decisions require the same process. Classify decisions as:

- Level 1: Inform others of your decision
- Level 2: Get input before deciding
- Level 3: Gain consensus before proceeding
- Level 4: Obtain formal approval

Matching the process to the decision's importance prevents both decision paralysis and rework due to insufficient consultation.

When Collaboration Gets Stuck

Despite best efforts, cross-functional work sometimes stalls. When this happens:

1. Focus on Interests, Not Positions

Move beyond stated positions to underlying interests:

- "What are you trying to accomplish with this approach?"
- "What concerns do you have about the alternative?"
- "What would need to be true for you to feel comfortable with X?"

This often reveals solutions that meet everyone's core needs.

2. Elevate Strategically

When peers reach an impasse, involving higher-level leadership may be necessary. Do this thoughtfully:

- Attempt direct resolution first
- Frame the escalation as seeking clarity, not complaining
- Present a balanced view of the situation
- Propose options rather than demanding intervention

3. Document and Learn

Use collaboration challenges as learning opportunities:

- Document what worked and what didn't

- Identify systemic issues that created friction
- Adjust processes for future initiatives
- Share insights with leadership to improve organizational effectiveness

The Fellowship of the Ring represents the ultimate cross-functional team: different backgrounds, skills, and priorities united around a common goal. What made it work wasn't formal authority (no one was really Frodo's boss) but mutual respect, clear purpose, and recognition of complementary strengths.

Case Study: The Gandalf Approach to Changing Roles

Let's bring these principles together through a comprehensive case study: Gandalf's approach to changing his role after millennia of service.

The Situation

Gandalf had begun to show his age. Having fought for millennia against the dark lord and his minions, perhaps it was time to let someone else take the mantel. Maybe it was time for Gandalf to retire—or at least significantly modify his role.

Gandalf wanted:

- More flexibility in when he worked (3-5 months off per year)
- More flexibility in where he worked (remote options)
- Reduced scope to match his new schedule
- Clear expectations about compensation adjustments

This request involved managing up to his supervisor (the essence of light and fire), managing down to his team of great eagles, and managing across to various stakeholders throughout Middle Earth.

Managing Up: Gandalf's Approach

Gandalf exemplified effective upward management:

1. He understood leadership's context

- Recognized the organization's need for continuity in his role
- Acknowledged budget constraints
- Appreciated the potential impact on team morale and perception

2. He communicated strategically

- Started with a clear email laying out his proposal
- Structured the message to address his supervisor's likely concerns
- Framed the change as a collaborative challenge: "I want to work with you to see what you need and how we can make this happen"

3. He provided solutions, not just requests

- Outlined specific proposals for how his responsibilities could be covered
- Suggested a phased transition rather than an abrupt change
- Identified potential benefits to the organization (reduced costs, development opportunities for others)

Managing Down: Transition Planning

Gandalf didn't just focus upward—he considered his team:

1. He assessed readiness for autonomy

- Evaluated which eagles were prepared for greater responsibility
- Identified skill gaps that needed addressing before his step back
- Considered the emotional impact of his reduced presence

2. He planned appropriate delegation levels

- Determined which responsibilities could be fully transferred
- Identified areas where he would maintain oversight
- Created a scaffolded approach to increasing team autonomy

3. He set up success systems

- Developed communication protocols for his remote periods
- Established clear escalation paths for urgent matters
- Planned regular check-ins to provide continuity

Managing Across: Stakeholder Consideration

Gandalf also addressed lateral relationships:

1. He built collaborative capital in advance

    ○   Had maintained strong relationships across Middle Earth
    ○   Demonstrated consistent reliability that created trust
    ○   Had helped others without expectation of return
2. He communicated strategically with partners

    ○   Planned how changes would be messaged to allies
    ○   Identified potential concerns from different stakeholders
    ○   Prepared responses to likely questions or objections
3. He clarified expectations going forward

    ○   Established new communication protocols
    ○   Defined what matters required his involvement versus others
    ○   Set realistic expectations about his availability

The Outcome

Though we don't know how the essence of light and fire responded (that's for next week's episode of "Gandalf and the Golden Girls"), Gandalf's comprehensive approach maximized his chances of success. By managing effectively up, down, and across, he transformed what could have been a contentious negotiation into a collaborative problem-solving exercise.

Conclusion: The 360° Manager

Throughout this chapter, we've explored how effective management extends in all directions:

- Upward to those with authority over you
- Downward to those you lead directly
- Across to peers and partners in other functions

The most effective managers—the ones who truly make work suck less—operate seamlessly across all three dimensions. They don't just focus on their team in isolation but see themselves as connectors within a larger ecosystem.

This 360° approach requires different skills for different directions:

- Managing up demands strategic communication and expectation management
- Managing down requires appropriate autonomy and development support
- Managing across calls for relationship-building and collaborative problem-solving

But the underlying principles remain consistent: understanding others' contexts, communicating purposefully, and creating value through relationships.

As you develop your management approach, consider how you can strengthen each dimension. The manager who excels in all three directions becomes what Gandalf truly was—not just a leader of their immediate team, but a unifying force that helps the entire organization achieve its quest.

In the next chapter, we'll explore another critical management skill: communication that actually works. We'll dig into how to move beyond scripts to authentic conversations that drive understanding, alignment, and action.

CHAPTER 7: Communication That Actually Works

Moving Beyond Scripts to Authentic Conversations

Let me tell you about a well-meaning but ultimately ineffective approach I witnessed at one of my previous companies. In an effort to standardize customer interactions, the leadership team created detailed conversation scripts for the support team. Every customer inquiry had a corresponding template response. Every objection had a predetermined rebuttal. Every scenario had a prescribed path.

On paper, it seemed efficient. In practice? It was a disaster.

Customers complained about robotic responses. Support agents felt constrained and demoralized. Unique situations fell through the cracks because they didn't fit the script. Most tellingly, resolution times actually increased because the scripted approach couldn't adapt to the messy reality of human communication.

This example highlights a fundamental truth: effective communication isn't about following scripts or templates. It's about authentic connection within an appropriate professional framework.

In this chapter, we'll explore how to move beyond rote communication to conversations that genuinely work—that build understanding, solve problems, and strengthen relationships.

The Limitations of Scripted Communication

Scripts and templates have their place. They provide consistency, ensure critical points aren't forgotten, and offer security for those new to a role. But they come with significant limitations:

- They can't adapt to unique situations When someone goes "off script" with their concerns or questions, a rigid approach breaks down.

- They overlook context and relationship The same message delivered to a long-term client versus a new prospect requires different framing and emphasis.

- They often sound inauthentic People can tell when they're getting a canned response rather than a thoughtful one.

- They prioritize convenience over connection Scripts optimize for the sender's efficiency rather than the recipient's understanding.

Think about the last time you called a customer service line and could tell the agent was reading from a script. How did it make you feel? Probably not heard or valued.

Now think about a conversation with someone who truly listened, asked thoughtful questions, and responded directly to your specific situation. The difference is profound.

The Elements of Authentic Communication

Authentic communication isn't about saying whatever comes to mind or being inappropriately casual. It's about bringing your full attention and genuine response to each interaction within an appropriate professional framework.

The key elements include:

1. Presence

Being fully engaged in the conversation rather than mentally rehearsing what you'll say next or thinking about other tasks.

2. Attunement

Adjusting your communication style based on the other person's needs, state, and communication preferences.

3. Transparency

Being honest about what you know, what you don't know, and what you can and cannot do.

4. Responsiveness

Addressing the actual content and emotions expressed rather than delivering pre-planned messages.

5. Appropriate vulnerability

Showing enough of your human side to connect while maintaining professional boundaries.

These elements create the foundation for communication that goes beyond transaction to meaningful connection—whether with team members, leadership, or external stakeholders.

Translating Technical Work to Business Value

One of the most common communication challenges managers face is translating specialized work into terms that resonate with different audiences. This is particularly important when communicating upward or across departments.

The Value Translation Framework

When communicating about your team's work, consider these levels of translation:

Level 1: Activities

What your team is actually doing day-to-day. Example: "We're refactoring the customer profile database."

Level 2: Outputs

The direct results of those activities. Example: "This will reduce database query times by 40%."

Level 3: Outcomes

The business impacts of those outputs. Example: "Customer service representatives will resolve issues faster because they can access complete customer information in seconds rather than minutes."

Level 4: Strategic Value

How these outcomes advance organizational goals. Example: "This supports our strategic priority of improving customer retention through superior service experiences."

Many managers communicate primarily at Levels 1 and 2, focusing on what their teams are doing and the immediate results. But leadership and cross-functional partners usually care most about Levels 3 and 4—the business outcomes and strategic alignment.

Here's how this might look in practice:

Technical Manager to Development Team (Levels 1-2): "We need to normalize the customer database schema and implement proper indexing. This will reduce query complexity and improve response times for all customer-facing applications."

Same Manager to Executive Leadership (Levels 3-4): "We're making infrastructure improvements that will cut customer wait times in half during service interactions. This directly supports our goal of increasing customer satisfaction scores by 15% this quarter and reduces the risk of losing high-value accounts due to service frustrations."

Same work, different framing—tailored to what the audience values and needs to know.

Avoiding Communication Extremes

When translating technical work, beware of these common pitfalls:

Overcomplicating

Drowning non-technical audiences in jargon and detailed explanations they don't need.

Instead of: "We're implementing a normalized NoSQL database with composite indexing and nested document structures to optimize for read-heavy workloads..."

Try: "We're restructuring our customer database to make information retrieval much faster, which will speed up every customer interaction."

Oversimplifying

Reducing complex work to such basic terms that its value and challenges are obscured.

Instead of: "We're doing some database stuff that will make things better."

Try: "We're investing in database improvements that will make all customer-facing systems more responsive. This is complex work that requires careful testing, but will deliver significant performance benefits across the organization."

The goal is to communicate at the right level of detail for your audience—enough information to convey value and constraints without unnecessary complexity.

When I managed technical teams, I created what I called "translation layers" for major projects. For each initiative, we documented:

- The technical description (for the team)
- The operational impact (for middle management)
- The business value (for executive leadership)
- The customer benefit (for sales and marketing)

This practice ensured we could quickly communicate our work effectively to any audience without scrambling to reframe it on the spot.

Making Your Needs Known Without Confrontation

Another crucial aspect of workplace communication is expressing your own needs or your team's needs effectively. Many managers either avoid stating needs (leading to frustration and unmet expectations) or express them in ways that create unnecessary tension.

The Non-Confrontational Needs Framework

This four-part structure helps communicate needs clearly while maintaining positive relationships:

1. Context

Start with relevant background that helps the other person understand where you're coming from.

2. Specific Need

Clearly state what you need, framed as a request rather than a demand.

3. Rationale

Explain why this need matters in terms that resonate with the other person's priorities.

4. Collaborative Invitation

Ask for their input on how to meet the need, maintaining their agency in the solution.

Let's see how this works in various scenarios:

Resource Request to Leadership:

"Context: Our customer onboarding team has seen a 40% increase in new accounts this quarter.

Specific Need: We need to add two team members to maintain our service standards.

Rationale: Without additional capacity, onboarding times will increase from 3 days to 7+ days, which risks new customers abandoning before they experience full value from our platform.

Collaborative Invitation: I'd like to discuss options for addressing this capacity gap. I've outlined a few approaches we could consider, including temporary contractors if full-time hires aren't possible right now."

Boundary Setting with a Peer:

"Context: I've noticed our teams have been scheduling a lot of ad-hoc meetings with minimal notice.

Specific Need: I need at least 24 hours notice for non-emergency meetings to effectively manage my calendar and commitments.

Rationale: This will help me come better prepared to our discussions and maintain focus on my team's priority deliverables during the rest of my day.

Collaborative Invitation: How does this work with your planning process? Is there anything I can do to make this easier from my end?"

Process Improvement with Team:

"Context: We've had some confusion around project handoffs between design and development.

Specific Need: We need a more structured handoff process with clear acceptance criteria.

Rationale: This will reduce rework, prevent last-minute surprises, and help us deliver more predictably to our clients.

Collaborative Invitation: I'd like your input on what an effective handoff process would look like from both the design and development perspectives."

This framework works because it provides context rather than making assumptions, clearly states the need without aggression, connects to shared priorities, and invites collaboration rather than issuing demands.

Navigating Resistance

Sometimes even well-framed needs encounter resistance. When this happens:

1. Seek understanding before responding

"Help me understand your concerns about this approach."

2. Look for unstated constraints

"Are there resource limitations or competing priorities I should be aware of?"

3. Find the mutual interest

"It seems we both want to [shared goal]. What approach might help us get there?"

4. Offer flexible implementation

"Could we try this on a limited basis to see how it works?"

5. Consider alternative paths

"If this specific approach won't work, what other ways might we address the underlying need?"

The key is maintaining a problem-solving orientation rather than falling into positional bargaining.

When Gandalf proposed his modified work arrangement, he likely encountered initial resistance. Rather than becoming defensive or giving up, he probably used these

techniques to understand concerns and find a mutually acceptable approach that met both his needs and the organization's.

Email Templates That Get Results

Despite the proliferation of chat tools and project management platforms, email remains a primary communication channel in most organizations. Yet many managers struggle with email effectiveness—sending messages that go unanswered, create confusion, or fail to drive action.

Let's explore some proven templates for common management email scenarios, along with the principles that make them effective.

The Action Request Email

Purpose: To get a specific action completed by a specific time.

Subject: [Action Required] Budget Approval for Q2 Marketing Campaign by Thursday

Hi [Name],

I hope this finds you well. I'm writing about the Q2 marketing campaign budget that requires your approval.

What I need: Your approval or feedback on the attached budget by Thursday, April 10.

Why it matters: The campaign is scheduled to launch on April 15. We need to finalize vendor contracts by Friday to maintain this timeline.

Details: The budget totals $45,000, which is within our quarterly allocation. The campaign focuses on the new enterprise features and targets our top 3 vertical markets.

Next steps: Please review the attached document and either:
1. Reply with your approval

2. Suggest specific adjustments

3. Let me know if we need to discuss further

Thank you for your help with this. I'm available if you have any questions.

Best regards,
[Your Name]

Why it works:

- Clear subject line with action and deadline
- Concise explanation of what, why, when, and how
- Specific, actionable next steps
- Easy response options

The Status Update Email

Purpose: To keep stakeholders informed about progress.

Subject: March Project Phoenix Update: On Track with Two Risk Areas

Hi Team,

Here's your monthly update on Project Phoenix as of March 31.

Overall Status: ON TRACK
We remain on schedule for the July 15 launch date.

Key Accomplishments This Month:
• Completed user authentication system
• Finalized design for mobile UI
• Secured all necessary regulatory approvals

Current Focus Areas:
• Integration testing with legacy systems

• Performance optimization for high-volume scenarios

Risk Areas:

1. Third-party API reliability: We've experienced intermittent issues with the payment processor API. Mitigation: Implementing robust retry logic and fallback options.

2. QA bandwidth: With Project Artemis launching in parallel, we have resource constraints in QA. Mitigation: Prioritizing critical path features and bringing in a contractor for specialized testing.

Upcoming Milestones:
• April 15: Beta release to internal users
• April 30: Complete performance optimization
• May 10: Begin external beta program

Full details and metrics are available in the project dashboard [link].

Questions or concerns? Please respond to this email or bring them to our Tuesday project review.

Regards,
[Your Name]

Why it works:

- Scannable format with clear sections
- Balances good news with transparent risk disclosure
- Includes both accomplishments and forward-looking information
- Provides context for metrics rather than just numbers
- Clear invitation for questions or concerns

The Meeting Follow-Up Email

Purpose: To capture decisions and action items after a meeting.

Subject: Action Items from Client Strategy Meeting (4/5)

Hello everyone,

Thank you for your participation in today's client strategy session. This email summarizes our key decisions and next steps.

Decisions Made:
1. We will proceed with the phased implementation approach rather than a full rollout.
2. The success metrics for Phase 1 will be: [specific metrics].
3. We will revisit the timeline after Phase 1 completion.

Action Items:
• [Person] will create the detailed Phase 1 plan by 4/12
• [Person] will schedule requirements workshops with the client for next week
• [Person] will update the budget forecast to reflect the phased approach by 4/10
• [Person] will draft the client communication by 4/7 for team review

Open Questions (to be resolved by 4/15):
• Can we leverage existing infrastructure for the initial deployment?
• Do we need additional security reviews for the new approach?

Our next meeting is scheduled for April 19 at 10am. Please come prepared to review the Phase 1 plan and address the open questions.

The meeting recording and notes are available here [link].

Please let me know if I missed anything or if you have questions.

Best,
[Your Name]

Why it works:

- Clearly separates decisions, actions, and open items
- Assigns ownership for each action item
- Includes specific deadlines
- Sets expectations for the next meeting
- Provides access to detailed information

Email Effectiveness Principles

Beyond these templates, apply these principles to all your management emails:

1. Front-load important information

Put your main point or request in the first paragraph. Don't make readers hunt for it.

2. Use descriptive subject lines

The subject should tell recipients why they should open the email and how urgently they need to act.

3. Make it scannable

Use headers, bullet points, bold text, and white space to make the email easy to consume quickly.

4. Be explicit about next steps

Don't leave action items, ownership, or deadlines ambiguous.

5. Consider your audience's preferences

Some stakeholders want comprehensive detail; others just want the headlines. Adjust accordingly.

6. Proofread for tone

Emails can come across as more abrupt or critical than intended. Review for unintentional tone issues.

7. Keep separate topics separate

Use different emails for different subjects rather than cramming everything into one message.

I learned the importance of email effectiveness the hard way. At the logistics company, I sent a detailed, three-page email outlining a proposed reorganization. It contained all the relevant information, but was so dense that most recipients either skimmed it or saved it for "later" (which never came). The resulting confusion and resistance could have been avoided with a more thoughtfully structured communication approach.

The Art of Active Listening

So far, we've focused primarily on expressing yourself effectively. But communication is a two-way street, and listening may be the more important skill—particularly for managers.

Why Managers Need to Master Listening

As a manager, your listening serves multiple purposes:

- Information gathering: Getting accurate data to inform decisions
- Relationship building: Creating psychological safety and trust
- Problem identification: Uncovering issues before they escalate
- Development support: Understanding team members' aspirations and challenges
- Conflict resolution: Finding paths forward when tensions arise

Yet many managers listen poorly. They interrupt, mentally prepare their response while others speak, get distracted by devices, or focus only on the parts of a message that confirm their existing views.

The Three Levels of Listening

Not all listening is created equal. Consider these levels:

Level 1: Internal Listening

You hear the words, but your focus is primarily on your own thoughts, judgments, and responses.

Signs you're at Level 1:

- Formulating your rebuttal while the other person speaks
- Waiting impatiently for your turn to talk
- Immediately relating what's said to your own experience
- Feeling defensive or emotionally reactive

Level 2: Focused Listening

You pay full attention to the speaker, focusing on their words, tone, and explicit meaning.

Signs you're at Level 2:

- Maintaining eye contact
- Noting key points and asking clarifying questions
- Paraphrasing to confirm understanding
- Setting aside your own reactions temporarily

Level 3: Global Listening

You attend to everything—words, tone, body language, emotions, and what remains unsaid.

Signs you're at Level 3:

- Noticing inconsistencies between words and non-verbal cues
- Sensing underlying emotions or concerns
- Hearing what's implied but not directly stated
- Perceiving patterns across multiple conversations

Most managers toggle between Levels 1 and 2. The most effective managers can access Level 3 when needed, particularly in high-stakes conversations or when addressing complex interpersonal dynamics.

Practical Techniques for Better Listening

These practices can help you consistently listen at Levels 2 and 3:

1. Create the right conditions

- Minimize distractions (close laptop, silence phone)
- Choose appropriate timing and environment
- Signal your attention through body language
- Manage your own state (if you're too stressed or rushed, postpone)

2. Practice active listening techniques

- Use encouraging verbal cues ("I see," "Tell me more")
- Ask open-ended questions that deepen understanding
- Paraphrase to confirm comprehension ("So what I'm hearing is...")
- Acknowledge emotions ("That sounds frustrating")

3. Manage your internal dialogue

- Notice when your mind wanders and gently refocus
- Observe your judgments without acting on them
- Separate understanding from agreement
- Be curious rather than defensive

4. Follow up appropriately

- Summarize key points at conversation's end
- Confirm next steps or agreements
- Check understanding later if topics were complex
- Circle back on important issues rather than assuming one conversation resolved them

At Affirm, I instituted a practice I called "Listening Rounds" in team meetings. Before discussing solutions to any significant issue, each person had 2 minutes to share their perspective while others practiced Level 3 listening. Only after everyone had been heard did we move to analysis and problem-solving. This simple structure prevented

dominant voices from controlling the narrative and surfaced insights we would otherwise have missed.

Difficult Conversations Without Drama

Some workplace communications are inherently challenging—delivering negative feedback, addressing performance issues, navigating conflicts, or delivering unwelcome news. These conversations often generate anxiety for both parties and can damage relationships if handled poorly.

The Preparation Framework

Before entering any difficult conversation, use this preparation framework:

1. Clarify your purpose

What specific outcome are you hoping for? Is this truly necessary?

2. Check your assumptions

What facts do you know versus what you're inferring? Where might you be missing information?

3. Consider their perspective

How might the other person view this situation? What pressures or concerns might they have?

4. Plan your approach

How will you open the conversation? What key points need addressing? What questions should you ask?

5. Prepare for reactions

How might they respond emotionally? How will you maintain composure if they become defensive or upset?

This preparation significantly improves outcomes by ensuring you enter the conversation with clarity rather than reactive emotion.

The CEDAR Conversation Model

For the conversation itself, the CEDAR model provides a clear structure:

Context

Begin by establishing shared context about the situation, using objective observations rather than judgments or interpretations.

"I'd like to discuss the client presentation from yesterday. I noticed that several key sections were missing and there were formatting inconsistencies throughout."

Emotion

Acknowledge emotions—both yours and theirs—to defuse tension and create psychological safety.

"I imagine this is difficult to hear, and I want you to know that my goal is to help us succeed together, not to criticize."

Diagnosis

Collaboratively explore the underlying causes rather than jumping to conclusions.

"Help me understand what happened with the preparation process. What challenges did you encounter?"

Alternatives

Discuss options for addressing the situation, inviting their input before offering your own suggestions.

"What approaches might work better next time? One thing I've found helpful is..."

Resolution

Agree on specific next steps, including any support needed and how you'll follow up.

"Let's recap what we've agreed: You'll create a preparation checklist for future presentations, I'll review early drafts to provide feedback, and we'll touch base next Tuesday to see how this approach is working."

This structured approach keeps difficult conversations focused and constructive while still allowing for genuine dialogue.

Managing Emotional Responses

Despite careful preparation, strong emotions sometimes arise during difficult conversations. When this happens:

If they become emotional:

- Pause the content discussion
- Acknowledge the emotion without judgment
- Offer a break if needed
- Return to the issue once emotions have settled

"I notice this topic brings up strong feelings. That's understandable. Would it help to take a few minutes before we continue?"

If you become emotional:

- Notice your physical reactions (tightening chest, elevated heart rate)
- Take deep breaths and ground yourself
- Name your emotion internally
- Focus on curiosity rather than judgment

"I'm noticing I'm feeling defensive right now. Let me take a breath and really listen to what you're saying."

The goal isn't to suppress emotions but to prevent them from hijacking the conversation.

Following Up After Difficult Conversations

What happens after the conversation often determines its long-term impact:

1. Document key points (for your records and/or shared documentation)
2. Follow through on commitments made during the discussion
3. Check in on both practical progress and relationship repair
4. Recognize improvement when it occurs
5. Adjust your approach based on what worked or didn't work

This follow-up demonstrates that the difficult conversation was about addressing the issue constructively, not just delivering unpleasant messages.

When I managed the support team in Utah, a team member repeatedly missed deadlines for weekly reports. After several informal reminders hadn't helped, I had a structured difficult conversation using the CEDAR model. We discovered that he was struggling with the report format because of previously undiagnosed dyslexia. Together, we created an alternative reporting approach that worked with his thinking style. The issue was resolved, and importantly, our relationship actually strengthened because he felt heard and supported rather than judged.

Conclusion: Communication as Continuous Improvement

Effective communication isn't a static skill you master once, but a practice you continuously refine. The approaches in this chapter provide frameworks to start from, but your communication will evolve with your experience, role, and the specific people you work with.

The most effective communicators share a few key traits:

1. They adapt their approach to different audiences and contexts
2. They reflect on what works and what doesn't
3. They invite feedback on their communication effectiveness
4. They practice intentionally, treating communication as a skill to develop
5. They maintain authenticity while developing technique

Remember our opening example about the scripted customer service responses? The problem wasn't having structures or frameworks. The problem was treating those frameworks as rigid scripts rather than flexible starting points for authentic connection.

The communication approaches in this chapter—translating technical work, expressing needs, crafting effective emails, practicing active listening, and navigating difficult conversations—all serve the same purpose: creating understanding that leads to positive action.

As a manager, your communication doesn't just convey information—it shapes culture, builds relationships, and enables everything else your team does. By moving beyond scripts to authentic, purposeful communication, you create an environment where work can truly suck less.

In the next chapter, we'll explore another critical aspect of your management journey: career transitions that make sense, both for yourself and for those you lead.

CHAPTER 8: Career Transitions That Make Sense

When to Make a Move Versus When to Stay

Remember our friend Frodo? He started his career split between home care services and working in local government, but found his passions lay elsewhere. As luck would have it, a friend encouraged him to apply to join a motivated team of nine at a mission-oriented startup; they each had a unique skillset, allowing them to achieve goals larger than the sum of their parts.

At first, Frodo figured he wouldn't pass the interview. He had a couple close friends on the team, but felt that his experience wasn't "resume" material. But with some help ironing out the details of his resume, he took the leap—and embarked on an adventure that would define his career.

Career transitions are rarely as dramatic as going from Assistant to the Mayor of Hobbiton to Bearer of the One Ring, but they all involve the same fundamental question: When is the right time to make a move, and when should you stay where you are?

The Stay-or-Go Framework

When considering a career transition—whether it's a role change, a company change, or an industry change—assess these five factors:

1. Growth Trajectory

- Are you still learning valuable skills?
- Do you see opportunities for advancement?
- Is your work challenging you in positive ways?

2. Values Alignment

- Does this work align with what matters to you?
- Are you proud of what you and your company do?
- Do you share core values with your leaders and colleagues?

3. Relationship Quality

- Do you have supportive relationships at work?
- Is there mutual respect between you and your manager?
- Do you have allies who advocate for your success?

4. Compensation Reality

- Are you fairly compensated for your contributions?
- Does your compensation support your lifestyle needs?
- Is there a path to increased compensation over time?

5. Work Environment

- Does the work environment support your wellbeing?
- Can you work in ways that align with your strengths?
- Is there reasonable flexibility to accommodate your life needs?

The decision to stay or go rarely comes down to just one of these factors. Usually, it's a weighted calculation based on which factors matter most to you and how many are currently satisfied.

For example, many people will accept lower compensation (#4) if the growth opportunity (#1) is exceptional. Others may tolerate a challenging work environment (#5) if the relationships (#3) and values alignment (#2) are strong.

When to Stay

Consider staying when:

- You're actively learning and developing in your current role
- You have strong relationships with colleagues and leadership
- Your work aligns with your core values
- You have a clear path to your next career goal within the organization
- Your compensation is fair and improving
- The work environment supports your productivity and wellbeing

Even with some pain points, if most of these conditions are met, the grass isn't necessarily greener elsewhere. Sometimes the best move is to address issues within your current context rather than starting fresh.

When I was at EasyPost, I faced a crossroads after building the Utah support team. I could have left for a new challenge, but I realized I had strong relationships, alignment with the company's mission, and opportunities to develop new technical skills. I chose to stay and move into a more technical role, which ultimately prepared me for my next career step.

When to Go

Consider moving on when:

- Your learning has plateaued with no new growth opportunities
- Key relationships have become strained or toxic
- Your values increasingly conflict with the organization's direction
- Your career path is blocked with no alternate routes
- Your compensation consistently undervalues your contribution
- The work environment undermines your health or effectiveness

The decision to leave becomes clearer when multiple factors align in the "go" direction, especially if you've already attempted to address the issues.

Boromir reached this point when he felt his ideas were consistently sidelined and the demands placed on him kept increasing without additional support. Despite his attempts to address these issues, the pattern continued, signaling it was time to seek a better fit elsewhere.

The "One Year Rule"

A practical guideline I often share with clients is the "One Year Rule": Give any new role at least one year before deciding it's not right for you (barring truly toxic situations).

Why one year?

- It takes 3-6 months to fully understand a new role and organization
- You need to experience a complete annual cycle of business activities
- Early challenges often resolve as you build relationships and credibility
- Meaningful accomplishments typically require several months to achieve

This rule helps distinguish between normal transition challenges and actual misalignment.

How to Tell Your Professional Story

Whether you're staying and advocating for advancement or leaving for new opportunities, your ability to tell your professional story powerfully affects your career trajectory.

The Elements of a Compelling Career Narrative

An effective professional story includes these key elements:

1. A Clear Thread

Identify the consistent themes that connect your seemingly different experiences—skills, values, or interests that have guided your path.

2. Growth Progression

Highlight how each role built upon previous experiences, even when making significant shifts.

3. Purposeful Choices

Frame transitions as deliberate decisions rather than random movements, even if they weren't entirely planned at the time.

4. Valuable Lessons

Emphasize what you learned from challenges or unexpected turns rather than focusing on failures or disappointments.

5. Forward Vision

Connect your past experiences to your future aspirations, showing how they prepare you for your next steps.

Framing Different Types of Transitions

Different career moves require different storytelling approaches:

Upward Transitions

When moving to higher levels of responsibility:

- Emphasize leadership moments from current and past roles
- Highlight results that demonstrate readiness for greater impact
- Connect your expertise to broader organizational goals
- Show how you've already been operating at the next level informally

Lateral Transitions

When moving to a different function or department:

- Identify transferable skills relevant to the new area
- Explain how your perspective from another function adds unique value
- Highlight successful cross-functional collaborations
- Connect your interest in the new area to longer-term career goals

Industry Transitions

When changing fields entirely:

- Focus on fundamental skills that transcend industry boundaries
- Research industry-specific language to translate your experience
- Leverage any connections between your old and new industries
- Acknowledge the learning curve while emphasizing your adaptability

Entrepreneurial Transitions

When moving from employment to self-employment:

- Frame previous roles as preparation for independent work
- Highlight instances of initiative and autonomous decision-making
- Emphasize client or customer-facing experiences
- Connect your expertise to specific market needs

Frodo's transition from local government to ring-bearing required significant reframing. Rather than focusing on the specific duties of assisting the Mayor of Hobbiton, we highlighted his initiative in creating an event planning process that increased festivals by 68% and reduced lead times from four weeks to one. This demonstrated his ability to improve processes and manage complex logistics—skills directly relevant to his journey across Middle Earth.

Telling Your Story in Different Contexts

Your professional narrative must adapt to different audiences and formats:

Resume/CV

- Use accomplishment statements that quantify impact
- Organize experiences to highlight relevant progression

- Use keywords aligned with target opportunities
- Be concise while including sufficient context

LinkedIn/Online Profiles

- Create a compelling summary that states your value proposition
- Highlight diverse aspects of your experience for broader visibility
- Include recommendations that reinforce your key strengths
- Use professional language while showing some personality

Networking Conversations

- Develop a concise "elevator pitch" of your background
- Adapt your story to connect with the specific person's interests
- Ask questions that allow you to emphasize relevant experience
- Be conversational rather than delivering a rehearsed monologue

Interviews

- Prepare stories that demonstrate your key qualities and experiences
- Connect your background directly to the role requirements
- Address transitions openly with positive framing
- Show how your unique path provides valuable perspective

One of my coaching clients, a former teacher transitioning to instructional design, developed different versions of her story: her resume emphasized creating learning materials and measuring outcomes; her LinkedIn highlighted collaboration and communication skills; her networking approach focused on her passion for adult learning; and her interview stories demonstrated project management and stakeholder engagement.

Reframing "Unrelated" Experience as Valuable

Many career changers worry that their previous experience will be seen as irrelevant. This concern is rarely warranted. With thoughtful reframing, almost any experience can demonstrate transferable value.

The Transferable Skills Approach

Identify fundamental skills that transcend specific roles:

Process Skills

- Problem-solving
- Critical thinking
- Decision-making
- Research and analysis
- Innovation and creativity

People Skills

- Communication (written and verbal)
- Collaboration and teamwork
- Negotiation and influence
- Leadership and motivation
- Conflict resolution

Personal Effectiveness Skills

- Time management
- Adaptability and learning agility
- Resilience and stress management
- Organization and planning
- Self-motivation and initiative

Most roles develop multiple skills in each category. The key is connecting these general skills to specific applications in your target role.

For example, a retail manager transitioning to project management might highlight:

- Process skills: optimizing store operations, analyzing sales data
- People skills: coordinating staff schedules, training new employees
- Personal effectiveness: managing competing priorities, adapting to seasonal demands

The Contextual Knowledge Approach

Beyond skills, previous experiences provide valuable contextual knowledge:

Industry Knowledge

Understanding how particular sectors function, even if your role within them changes.

Functional Perspective

Insight into how different business functions operate and interact.

Customer Understanding

Familiarity with specific customer segments and their needs.

Organizational Dynamics

Experience with different company cultures and structures.

This contextual knowledge often provides unique value when combined with new skills or perspectives.

A healthcare administrator moving into healthcare technology brings valuable understanding of clinical workflows, regulatory requirements, and stakeholder priorities that purely technical professionals may lack. This contextual knowledge often becomes their unique competitive advantage.

The Alternative Perspective Value

Sometimes, the greatest value you bring to a new role is precisely that you *don't* have the "traditional" background. Your different perspective can:

- Identify assumptions others take for granted
- Bring fresh approaches to persistent challenges
- Make connections between seemingly unrelated areas
- Translate specialized knowledge for broader audiences
- Challenge "we've always done it this way" thinking

When I worked with a former teacher transitioning to corporate training, we highlighted how her experience managing a classroom of 30 students with diverse learning styles prepared her to engage adult learners more effectively than many traditional corporate trainers. Her "unrelated" background became her differentiator.

Addressing Gaps and Career Pauses

Not all career stories follow a neat, linear progression. Many include gaps, pauses, or detours due to caregiving responsibilities, health issues, economic circumstances, or simply exploration and reinvention.

Rather than seeing these as weaknesses to hide, consider these approaches:

1. Focus on continuous development

Highlight skills maintained or developed during career pauses, whether through volunteering, self-directed learning, or personal projects.

2. Embrace honest framing

Brief, matter-of-fact explanations without apology or excessive detail often work best. "I took two years to care for my elderly parent. During that time, I also maintained my professional skills by..."

3. Emphasize return momentum

When re-entering after a pause, highlight recent achievements and current capabilities more than distant past experience.

4. Connect dots forward

Show how apparently unrelated experiences contribute to your unique perspective and readiness for the next opportunity.

One of my most successful clients was a woman returning to work after eight years raising children. Rather than apologizing for the gap, she highlighted the project management, conflict resolution, and multitasking skills she had honed as a parent. She secured a role managing complex stakeholder relationships for a consulting firm, where her maturity and life experience became significant assets.

Frodo's Journey: From Caretaker to Ring-Bearer

Let's return to Frodo's career transition to see these principles in action:

Initial Resume:

Assistant to the Mayor of Hobbiton (TA 2987 - TA 2993)

- Assisted the Mayor with his day-to-day duties, such as meeting with constituents and attending town council meetings

Member of the Shire's Home Guard (TA 2990 - TA 2992)

- Trained in the use of weapons and participated in drills and exercises

Caretaker of Bag End (TA 2984 - Present)

- Oversaw the maintenance and upkeep of Bilbo Baggins's hobbit-hole

Transformed Resume:

Assistant to the Mayor of Hobbiton (Third Age 2987 - TA 2993)

- Assisted the Mayor with his day-to-day duties, such as meeting with constituents and attending town council meetings

- Managed an initiative to institute Hobbiton's event planning and permitting process, increasing the number of festivals held in the town square by 68% and reducing the lead time needed for each festival from four weeks down to one

Caretaker of Bag End (TA 2984 - Present)

- Oversaw the maintenance and upkeep of Bilbo Baggins's hobbit-hole

- Applied for and utilized a grant from the Department of Housing and Urban Development to make much-needed repairs to the structural supports of the building, enabling Bag End's owner to continue building equity even in poorer economic conditions

What Changed?

1. Accomplishment focus: The revised version highlights results and impact, not just responsibilities.

2. Initiative emphasis: We showcased Frodo's self-directed improvements, not just assigned tasks.

3. Quantified outcomes: The 68% increase in festivals and reduction from four weeks to one provides concrete evidence of effectiveness.

4. Strategic framing: Maintenance work is reframed as asset preservation and value creation.

5. Strategic omission: The Home Guard experience was removed as it didn't align with the ring-bearer role's requirements.

When Frodo initially considered applying to the Fellowship, he sold himself short. He listed his general duties in each role but didn't consider the real impact he had through his work. For example, Frodo made Hobbiton more efficient and gave the folks that live there a formalized process to plan and hold festivals. That is huge! Not only does that speak to Frodo's ability to introduce operational improvements, it also shows that Frodo's head is in the right place: he knows what initiatives to prioritize to make the places we call home better.

Frodo had difficulty identifying the aspects of his work that employers are looking for. Living in it and working in it can make you habituated to the compelling aspects of what you do and what you accomplish every day. But I am confident when I say this: Frodo does (and you do!) things every day that are compellingly complex, difficult, and valuable.

The Resume Isn't Everything: Beyond the Document

While we've focused on resume transformation, it's important to recognize that the document is just one element of a successful career transition. Here are the other critical pieces:

1. The Network Effect

The Fellowship wasn't just looking for qualified candidates through blind applications. Gandalf knew Frodo through Bilbo and could vouch for his character. This personal connection matters enormously.

Research consistently shows that 60-80% of jobs are filled through networking rather than public applications. This doesn't mean you need to be an extrovert attending networking events in sharp business attire. Effective networking can be:

- Reaching out to former colleagues for coffee
- Participating in online professional communities
- Asking for informational interviews in target fields
- Reconnecting with school alumni in relevant roles
- Volunteering in contexts where you meet professionals

The goal isn't to ask for jobs directly, but to build relationships that provide insight, guidance, and eventually advocacy when opportunities arise.

2. The Interview Reality

A great resume gets you the interview. The interview gets you the job. These are different challenges requiring different skills.

For the interview, Frodo needed to demonstrate:

- His ability to work cross-functionally with diverse team members (elves, dwarves, humans)
- His resilience in the face of challenges
- His integrity and trustworthiness with precious objects
- His commitment to the mission despite personal risk

None of these qualities could be fully communicated on a resume. They required storytelling, presence, and authentic connection during the interview process.

3. The Continuous Development Path

Career transitions rarely end when you secure the new role. They continue as you establish yourself and grow in the new context.

For Frodo, getting selected for the Fellowship was just the beginning. He still needed to:

- Build credibility with new colleagues
- Develop ring-specific skills (resisting corruption, evading Nazgûl)
- Navigate unfamiliar territories (literally and figuratively)
- Adapt to changing circumstances (fellowship breakup, new companions)

The most successful career changers continue their development strategy well after landing the new role, recognizing that the first 3-6 months are critical for establishing their value and trajectory.

Managing Career Transitions as a Leader

So far, we've focused on navigating your own career transitions. But as a manager, you also play a crucial role in others' career journeys—both supporting transitions within your team and managing the impact when team members leave.

Supporting Internal Career Development

Effective managers help team members grow, even when that growth might eventually lead them elsewhere in the organization:

1. Regular career conversations

Schedule discussions specifically focused on career aspirations, separate from performance reviews.

2. Stretch assignments

Provide opportunities to develop new skills and demonstrate capabilities beyond current role.

3. Internal visibility

Help team members showcase their work to other leaders and departments.

4. Skill development plans

Collaborate on learning roadmaps that align with both current responsibilities and future aspirations.

5. Honest guidance

Give candid feedback about readiness for different roles and development needs.

When I managed at Affirm, one of my technical account managers expressed interest in moving toward product management. Rather than discouraging this potential move away from my team, I helped her create a development plan that included product-focused projects within her current role. She eventually made a successful internal transition, maintaining her institutional knowledge within the company and becoming a valuable cross-functional ally for my team.

Managing External Transitions

When team members decide to leave the organization, how you handle their departure affects both the departing employee and those who remain:

1. Respond graciously

React to resignation news with support rather than disappointment or anger.

2. Understand the real reasons

Conduct thoughtful exit interviews to gain insights about what might need addressing.

3. Create knowledge transfer plans

Work with departing employees to document processes and transition responsibilities.

4. Celebrate contributions

Acknowledge the positive impact they've made on the team and organization.

5. Maintain connections

Treat departing team members as alumni rather than deserters, keeping doors open for future collaboration.

At the logistics company, we instituted a "boomerang" mindset that recognized valuable employees might return with enhanced skills after experiences elsewhere. This approach reduced defensiveness around departures and actually led to several successful returnees who brought back valuable external perspectives.

Supporting Your Manager's Transition

Sometimes the career transition affecting you most directly is your manager's move to a new role. When your boss leaves, you face both challenges and opportunities:

1. Maintain continuity

Step up to ensure critical work continues smoothly during the transition.

2. Document their knowledge

Capture their insights, methods, and contextual understanding before they leave.

3. Clarify your status

Have direct conversations about how their departure affects your role and reporting structure.

4. Establish relationships with new leadership

Be proactive about connecting with their replacement or interim manager.

5. Consider your own next steps

Use the transition as a catalyst to reflect on your own career direction and options.

When my manager at Affirm moved to another company, I used the transition period to demonstrate leadership capabilities that weren't as visible previously. This eventually led to my promotion to manage the team—an opportunity that arose directly from how I handled that transition.

Common Career Transition Pitfalls

Even with thoughtful planning, career transitions involve risks. Here are common pitfalls to avoid:

1. The Escape Fantasy

Changing jobs to escape problems rather than move toward opportunities often leads to disappointment. Before making a move, distinguish between:

- Problems specific to your current situation (potentially solved by changing jobs)
- Problems common to the type of work (will follow you to similar roles)
- Problems within yourself (will persist regardless of external changes)

2. The Perfect Fit Fallacy

Waiting for the "perfect" opportunity often means missing good opportunities that could evolve into great ones. Instead of seeking perfection, identify your non-negotiable requirements and be flexible about the rest.

3. The Compensation Tunnel Vision

Focusing exclusively on salary or title can lead to roles that pay well but undermine wellbeing or development. Consider the total package:

- Base compensation
- Benefits and perks
- Growth opportunities

- Work-life integration
- Culture and colleagues
- Meaningful impact

4. The Network Neglect

Waiting until you need a job to build professional relationships puts you at a significant disadvantage. Nurture your network continuously throughout your career, not just during active job searches.

5. The Skills Exaggeration

Overstating capabilities to land a role often leads to stress and potential failure once hired. Instead:

- Be honest about your current capabilities
- Emphasize your learning capacity and adaptability
- Propose concrete plans for closing skill gaps
- Seek roles that offer appropriate onboarding support

I've worked with clients who made each of these mistakes. One left a stressful job only to find the same issues in a new environment because the core problems were industry-wide. Another passed on promising opportunities waiting for an idealized role that never materialized. A third took a substantial pay increase but found herself miserable in a toxic culture. Each eventually found better fits, but only after learning these costly lessons.

Conclusion: Your Next Chapter

Career transitions are both challenging and transformative. They require courage, clarity, and often support from others who can help you see possibilities you might miss on your own.

Whether you're contemplating your own next move or supporting team members through their transitions, remember that career paths rarely follow straight lines. The

most fulfilling careers often involve unexpected turns, sideways moves, and sometimes even steps back before leaping forward.

Frodo didn't set out to become a ring-bearer when he started as a local government assistant. Gandalf didn't imagine a semi-retirement schedule when he began battling dark forces. Boromir didn't plan to search for a new fellowship when he joined his first team.

Yet each found their way to roles that—while imperfect and challenging—ultimately aligned with their capabilities and contributions to their world.

Your career journey is uniquely yours. The frameworks, strategies, and insights in this chapter can help you navigate transitions more effectively, but the path you forge will reflect your own values, aspirations, and circumstances.

As you consider your next chapter, remember that the goal isn't a perfect career but rather a purposeful one—where your strengths meet meaningful challenges in environments that allow you to thrive.

In the next chapter, we'll explore another critical aspect of making work suck less: creating sustainable practices that support work-life integration in our always-connected world.

CHAPTER 9: Work-Life Integration in the Modern Workplace

Moving Beyond Balance to Integration

The concept of "work-life balance" has been around for decades. It conjures images of perfectly equilibrated scales—work on one side, life on the other, neither outweighing its counterpart. It's a lovely metaphor, but as anyone who's actually tried to achieve this mythical balance knows, it doesn't quite capture reality.

Here's the truth: balance implies separation. It suggests that work and life are distinct domains that can and should be neatly partitioned. But for most of us, especially in the digital age, the boundaries are far more permeable. Your brilliant project idea might strike while playing with your kids. Your worry about a family member's health might distract you during a meeting. Your professional passion might be central to your identity and fulfillment.

Rather than striving for balance, I encourage a shift toward integration—thoughtfully blending work and personal life in ways that honor your priorities, energy patterns, and circumstances.

This isn't about working more or letting work invade every corner of your life. It's about creating a more realistic, flexible, and personalized approach to how work fits into your broader life ecosystem.

From Rigid Boundaries to Thoughtful Integration

Traditional work-life balance often relies on rigid boundaries:

- Work happens between 9 AM and 5 PM
- Personal activities happen outside those hours
- Weekdays are for work, weekends are for life
- Work stays at the office, home is for family

These clean dividing lines worked reasonably well in the industrial era when most work required physical presence at specific locations. They make less sense in an age of knowledge work, global collaboration, and digital connectivity.

Integration acknowledges that:

- Different types of work require different energy states
- Personal commitments sometimes fall within traditional work hours
- Creative insights don't follow a time clock
- Technology enables flexibility in when and where work happens

However, integration without intention quickly becomes infiltration—work seeping into every moment of life. The key is thoughtful integration guided by your values and priorities.

The Integration Spectrum

Work-life integration exists on a spectrum, from highly segmented to highly integrated:

High Segmentation

- Clear boundaries between work and personal domains
- Distinct physical spaces for different activities
- Scheduled transitions between work and personal time
- Separate devices or accounts for work and personal use
- Limited or no work discussion outside work hours

Moderate Integration

- Flexible work scheduling around key personal priorities
- Some blending of workspaces with personal spaces
- Selective availability outside core hours
- Shared devices with boundary-maintaining features
- Appropriate work discussions in personal settings

High Integration

- Work and personal activities interwoven throughout the day
- Unified physical spaces for different activities
- Continuous shifting between work and personal tasks
- Fully merged digital ecosystems
- Work as an integrated part of social identity and relationships

No point on this spectrum is inherently better than others. The right approach depends on:

- Your personality and preferences
- The nature of your work
- Your personal circumstances

- Your current life season
- Your specific role requirements

You might even operate at different points on the spectrum for different aspects of your life or during different periods.

At Affirm, I worked with two equally effective senior managers with completely different approaches. One worked intensely from 7 AM to 3 PM with zero work contact afterward, creating near-complete segmentation. The other spread work throughout her day, taking extended breaks for family activities and returning to tasks in the evening, embracing high integration. Both approaches worked because they were intentional choices aligned with personal circumstances and preferences.

Creating Sustainable Practices

Regardless of where you fall on the integration spectrum, sustainable practices are essential for long-term wellbeing and effectiveness. These practices create structure without rigidity, allowing you to adapt while maintaining necessary boundaries.

Time Management Reimagined

Traditional time management focuses on maximizing productivity within work hours. Integration requires a broader approach that considers energy, attention, and priorities across all life domains.

Energy-Based Scheduling

Align different types of work with your natural energy patterns:

- Identify your peak cognitive hours for complex work
- Schedule routine tasks during lower energy periods
- Reserve certain days or time blocks for deep focus
- Build in true recovery time (not just switching activities)

When I managed teams, I encouraged everyone to identify their "golden hours"—their periods of peak focus and creativity—and protect those times for their most important work. For some, this meant early mornings before email began flowing. For others, it

meant late evenings after family responsibilities were handled. By honoring these individual patterns, the team achieved better results with less burnout.

Priority Alignment

Ensure time allocation matches stated priorities:

- Audit how you actually spend time versus how you want to spend it
- Schedule priority activities before filling time with lower-value work
- Create "non-negotiable" commitments for both work and personal priorities
- Review and adjust regularly as priorities evolve

One practical method is the "calendar review"—looking ahead at your next week's schedule and asking: "Does this calendar reflect what matters most to me right now?" If not, make adjustments before the week begins.

Boundary Rituals

Create transitions that help your brain switch contexts:

- Develop start-up and shutdown routines for workdays
- Establish physical signals that mark context changes
- Use technology settings that support your boundaries
- Create buffer zones between different types of activities

Even in highly integrated approaches, these rituals help prevent work from dominating by default. They might be as simple as changing locations, switching devices, or taking a short walk to signal a context shift to your brain.

Digital Wellbeing Practices

Technology enables integration but also creates risks of constant connectivity and attention fragmentation. Thoughtful digital practices are essential:

Notification Management

Take control of how technology interrupts you:

- Audit current notifications and eliminate non-essential alerts

- Create time-based profiles for different contexts (work mode, family mode, etc.)
- Use "do not disturb" features strategically
- Consider dedicated devices or accounts for different purposes

Attention Protection

Preserve your most valuable resource—focused attention:

- Batch similar activities to reduce context switching
- Schedule specific times for email and messaging
- Use technology tools that block distractions during focus periods
- Create phone-free zones or times for deeper connection

Digital Boundaries with Teams

Establish clear expectations around technology use:

- Communicate your availability hours clearly
- Model appropriate urgency in communications
- Use asynchronous tools for non-urgent matters
- Respect others' stated boundaries

In the Technical Account Management team at Affirm, we created a communication protocol that specified which channels to use for different urgency levels: email for FYI items, Slack for questions needing same-day response, texts for urgent issues, and phone calls only for true emergencies. This clarity reduced stress and helped everyone manage their attention more effectively.

Physical and Mental Wellbeing Integration

Sustainable integration requires attending to physical and mental health as non-negotiable priorities:

Movement Integration

Find ways to incorporate physical activity throughout your day:

- Walking meetings for appropriate discussions

- Microbreaks for stretching and movement
- Standing or mobile workstations for suitable tasks
- Physical activity scheduled as appointments, not as "if there's time"

Stress Management Practices

Build regular stress reduction into your routine:

- Brief mindfulness practices between activities
- Breathing exercises during transitions
- Nature contact, even briefly, throughout the day
- Regular check-ins with your physical and emotional state

Rest and Recovery

Recognize that productivity requires renewal:

- Proper sleep as a performance enhancement, not a luxury
- True breaks that involve different activities and mental states
- Vacation time that allows genuine disconnection
- Sabbaticals or extended breaks for renewal when possible

When I coached a technical leader experiencing burnout, we discovered he hadn't taken a true vacation in three years. He would physically leave the office but remain constantly connected to email and calls. We created a two-week complete disconnection period with detailed coverage plans. The team survived without him, and he returned with renewed perspective and energy that benefited everyone.

Reducing Hours Without Reducing Impact

One specific aspect of work-life integration that deserves special attention is the potential to reduce working hours while maintaining or even increasing your impact. This might involve formal arrangements like part-time schedules or four-day workweeks, or informal approaches to creating more space within traditional structures.

The Parkinson's Law Principle

Parkinson's Law states that "work expands to fill the time available for its completion." Most of us have experienced this firsthand—given eight hours, a task takes eight hours. Given four, we often find ways to complete it in four.

This isn't about working more intensely or creating unsustainable pressure. It's about:

- Eliminating low-value activities
- Focusing on true priorities
- Reducing unnecessary perfectionism
- Streamlining collaboration and communication

When Gandalf approached the essence of light and fire about reducing his work hours, he wasn't proposing to accomplish less. He was proposing to focus his time on activities where his unique wisdom and abilities made the greatest difference, eliminating work that others could handle or that didn't truly need doing.

The Leverage Strategy

Reducing hours while maintaining impact requires identifying your highest-leverage activities—those where your specific skills and position create disproportionate value:

1. Activity Audit

List everything you do in a typical week or month, then categorize activities:

- High leverage: Your unique skills create significant value
- Medium leverage: You add value but others could potentially do this
- Low leverage: Routine tasks that don't require your specific capabilities

2. Elimination and Delegation

- Stop doing low-value activities entirely when possible
- Delegate medium-leverage activities to team members who could grow from them
- Automate routine tasks where technology can replace manual effort
- Streamline necessary but low-leverage work to consume minimal time

3. Focus and Depth

With non-essential activities removed:

- Concentrate remaining time on highest-impact work
- Create conditions for deeper focus and higher quality
- Reduce context-switching that drains productivity
- Build in reflection time that improves decision quality

One of my coaching clients, a senior designer, negotiated a four-day workweek by first tracking how she spent her time for a month. She discovered that 30% of her time went to activities that could be eliminated, automated, or delegated. By restructuring her role to focus almost exclusively on high-leverage design direction and mentorship, she delivered more value in four days than she had previously in five.

Formal Reduced-Hour Arrangements

If you're considering a formal reduction in hours, these approaches increase your chances of success:

1. Build from strength

Propose arrangements based on demonstrated performance and trust, not as accommodations for personal challenges.

2. Focus on outcomes

Frame the discussion around results and impact rather than time spent.

3. Present a specific plan

Outline exactly how work will be covered, including communication protocols and contingency plans.

4. Suggest a trial period

Propose a time-limited experiment with clear evaluation criteria.

5. Address concerns proactively

Anticipate potential issues and include solutions in your proposal.

When I helped Gandalf prepare for his conversation about reducing his schedule, we carefully mapped out how his most critical responsibilities would be handled during his extended time away. This preparation demonstrated that he had thought through the implications rather than simply asking for accommodation.

Case Study: Gandalf's Golden Years Strategy

Speaking of Gandalf, let's explore his work-life integration journey in more detail as a comprehensive case study.

The Situation

After millennia of service battling dark forces, Gandalf wanted to shift his work-life balance to spend more time with the friends and communities he had protected for so long. Specifically, he sought:

- 3-5 months off annually
- Remote work flexibility when actively working
- Reduced scope aligned with his reduced schedule
- Appropriate compensation adjustment

This wasn't about disengagement from his mission—Gandalf still cared deeply about Middle Earth's wellbeing. It was about sustainability and meaning in this phase of his extraordinarily long career.

The Preparation Process

Before approaching leadership, Gandalf undertook thorough preparation:

1. Clarity Development

He reflected deeply on what truly mattered to him at this stage—connecting with mortal communities whose lifespans were so brief compared to his own, while still contributing his wisdom to protecting Middle Earth.

2. Value Assessment

He identified his highest-value contributions—strategic guidance, crisis intervention during peak danger periods, and mentoring the next generation of guardians.

3. Coverage Planning

He developed detailed proposals for how essential responsibilities would be handled during his absence, including specific individuals who could step up with proper support.

4. Flexibility Boundaries

He determined which aspects were truly non-negotiable (some time completely away) versus areas where he could compromise (specific timing of his availability).

5. Implementation Roadmap

He created a phased approach for transitioning responsibilities, building others' capabilities, and gradually adjusting his involvement.

The Proposal Approach

Gandalf's communication strategy exemplified best practices:

1. Partnership Framing

Rather than presenting demands, he positioned the conversation as collaborative problem-solving: "I want to work with you to see what you need and how we can make this happen."

2. Organizational Benefit Integration

He highlighted how his proposal could benefit the organization through reduced costs, development opportunities for others, and his renewed energy during working periods.

3. Comprehensive Consideration

His proposal addressed practical logistical questions, considerations about perception and precedent, and implementation approaches.

4. Openness to Alternatives

While clear about his core needs, he demonstrated willingness to explore different approaches to meeting them: "I am here to work together on this, and I so appreciate your partnership in making this happen."

The Implementation Strategy

Once an agreement was reached, Gandalf planned a careful implementation:

1. Phased Transition

Rather than abrupt change, he scheduled a gradual shift of responsibilities over several months.

2. Knowledge Transfer

He documented crucial information and mentored those taking on portions of his previous role.

3. Communication Planning

He developed appropriate messaging for various stakeholders to ensure understanding and support.

4. Regular Reassessment

He scheduled check-in points to evaluate how the arrangement was working for all parties and make adjustments as needed.

5. Boundary Maintenance

He established clear protocols for true emergencies versus routine matters during his away periods.

While we don't know the essence of light and fire's final response, Gandalf's thorough approach maximized his chances of success. His strategy addressed not just his personal needs but also organizational requirements, creating a potentially sustainable arrangement for his "golden years."

Managing Teams with Diverse Integration Approaches

As a manager, you're not just responsible for your own work-life integration but also for creating an environment where team members can develop sustainable approaches tailored to their circumstances and preferences.

The Integration Culture Assessment

Start by evaluating your current team culture around work-life integration:

Explicit Expectations

What formal policies exist regarding schedules, availability, and flexibility?

Implicit Messages

What unspoken signals do team members receive about acceptable practices?

Leadership Modeling

How do managers demonstrate their own integration approaches?

Performance Metrics

How is success measured—by hours worked or outcomes achieved?

Team Traditions

What customs or rituals reinforce particular integration perspectives?

Understanding these elements helps identify gaps between stated values and actual practices.

Creating Supportive Structures

Based on your assessment, develop structures that enable appropriate integration:

1. Clear Core Hours

Designate specific hours when synchronous collaboration happens, leaving other time flexible.

2. Results-Focus

Shift performance evaluation toward outcomes rather than activity or presence.

3. Communication Protocols

Establish team agreements about response times, channel choices, and availability expectations.

4. Flexibility Guidelines

Create frameworks that allow personalization while maintaining necessary coordination.

5. Regular Check-ins

Include wellbeing and sustainability in normal conversation, not just during crises.

When I managed the support team in Utah, we implemented "Focus Fridays"—no internal meetings and limited client meetings on Fridays to allow for deeper work or flexible scheduling. This simple structure created space for individual integration approaches while maintaining team coordination Monday through Thursday.

Supporting Different Life Seasons

Work-life integration needs vary dramatically based on life circumstances:

Early Career

Typically involves higher capacity for time investment balanced with identity formation and social connection needs.

Caregiving Periods

Whether parenting young children, supporting aging parents, or handling health challenges, these periods require significant flexibility and understanding.

High Growth Phases

Sometimes personal or professional development requires temporary intensity that should be balanced with recovery periods.

Transition Points

Major life or career changes often necessitate temporary adjustments to integration approaches.

Effective managers recognize these seasons and work with team members to adapt expectations and support accordingly, rather than enforcing one-size-fits-all standards.

Addressing Integration Challenges

Even with supportive structures, challenges inevitably arise:

Workload Imbalances

When some team members consistently carry heavier loads due to others' integration needs:

- Audit workload distribution regularly
- Rotate coverage responsibilities
- Acknowledge additional contributions
- Create reciprocity expectations

Communication Gaps

When flexible schedules create coordination difficulties:

- Implement better documentation practices
- Utilize asynchronous collaboration tools
- Create clear handoff procedures
- Establish status visibility mechanisms

Boundary Ambiguity

When unclear expectations create anxiety or overwork:

- Explicitly discuss boundary assumptions
- Document agreed-upon availability
- Create permission for boundary enforcement
- Review and adjust when circumstances change

At Affirm, we discovered that flexible work arrangements were creating unintentional information silos. We implemented "digital standup" practices where team members posted brief updates on a shared channel at the beginning of their workday, regardless of when that occurred. This simple practice maintained coordination while respecting individual schedules.

Managing Integration During Organizational Change

Work-life integration becomes particularly challenging during periods of significant organizational change—acquisitions, restructuring, leadership transitions, or strategic pivots. These situations often create pressure to demonstrate commitment through presence and availability.

Change-Resistant Integration Practices

Some approaches help maintain appropriate boundaries even during turbulent periods:

1. Energy Preservation

Recognize that change consumes emotional and mental energy, requiring even more intentional recovery periods.

2. Priority Recalibration

Regularly reassess what truly matters as organizational focus shifts.

3. Expectation Clarification

Proactively discuss integration expectations with new leadership or reorganized teams.

4. Support Network Activation

Lean on colleagues and mentors who can provide perspective during challenging periods.

5. Non-Negotiable Protection

Identify the boundaries you absolutely must maintain for wellbeing and hold them firmly.

During a major reorganization at the logistics company, I helped my team create individual "sustainable performance plans" that identified their core wellbeing requirements alongside their professional commitments. These plans gave them permission to maintain essential boundaries while still fully engaging with the organizational transition.

Conclusion: The Integrated Manager

Work-life integration isn't a fixed destination but an ongoing process of alignment—bringing your professional activities into harmony with your values, circumstances, and wholeness as a person.

As a manager, your approach to integration affects not only your own wellbeing but also sets powerful norms for your team and organization. When you demonstrate sustainable practices, you create permission for others to develop approaches that work for their unique situations.

The most effective leaders I've known share these integration characteristics:

1. They're clear about their priorities across all life domains, not just work.

2. They're intentional about boundaries while remaining appropriately flexible.

3. They're transparent about their integration approaches, neither hiding personal commitments nor imposing their specific methods on others.

4. They're constantly learning and adjusting as circumstances and needs evolve.

5. They recognize seasons and cycles rather than seeking permanent solutions.

Integration doesn't mean working more or constantly being available. It means bringing your whole self to your work while ensuring work remains in proper perspective within your broader life.

When Gandalf sought a new arrangement for his golden years, he wasn't choosing between work and life. He was reimagining how his work could better integrate with the full spectrum of what gave his long existence meaning and purpose.

That's the essence of true work-life integration—not perfect balance, but thoughtful alignment that enables sustainable contribution and genuine fulfillment.

In the next chapter, we'll explore how to build teams where unique individuals with diverse skills and perspectives come together to achieve results greater than the sum of their parts—what I call the Fellowship Principle.

CHAPTER 10: The Fellowship Principle - Building Teams That Work

Creating Psychological Safety

Nine individuals with different backgrounds, skills, species, and motivations. Brought together for an impossible mission with world-ending stakes. No clear hierarchy, minimal preparation time, and a journey fraught with danger at every turn.

On paper, the Fellowship of the Ring had no business succeeding. Yet despite setbacks and the eventual splintering of the group, they accomplished their ultimate goal against overwhelming odds.

What made this unlikely team work? And what can we learn from them about building effective teams in our own organizations?

The answer begins with psychological safety—the shared belief that team members can take interpersonal risks without facing negative consequences to self-image, status, or career. In simpler terms, it's the confidence that you won't be punished, humiliated, or rejected for speaking up with ideas, questions, concerns, or mistakes.

Why Psychological Safety Matters

Google's extensive Project Aristotle research identified psychological safety as the single most important factor in effective teams—more important than individual talent, clear goals, or even meaningful incentives. This confirms what many of us have experienced: brilliant individuals working in fear-based environments typically underperform compared to moderately talented people working in psychologically safe ones.

Psychological safety enables:

- Honest communication without fear of retribution
- Risk-taking and innovation without paralyzing fear of failure
- Diverse perspectives shared without concern about fitting in
- Faster learning through open discussion of mistakes
- Greater resilience during challenges and setbacks

Consider how the Fellowship handled their devastating loss in the Mines of Moria. Despite the grief of losing Gandalf, team members could express vulnerability, question the path forward, and eventually recommit to the mission. This resilience stemmed directly from the psychological safety established among them.

Building Safety from Day One

Psychological safety doesn't happen accidentally. It requires deliberate action, particularly from leaders:

1. Frame Work as Learning Problems, Not Execution Problems

When presenting challenges, emphasize learning and growth rather than flawless performance:

Instead of: "We need perfect execution on this project. Failure isn't an option."

Try: "This project will stretch our capabilities. We'll certainly hit obstacles, but that's how we'll develop mastery in this new area."

When Gandalf presented the mission to destroy the Ring, he didn't pretend success was guaranteed. He acknowledged the tremendous difficulty and framed it as an endeavor requiring collective learning and adaptation.

2. Acknowledge Your Own Fallibility

Leaders who admit mistakes and limitations make it safe for others to do the same:

- Share past failures and what you learned from them
- Ask for help when you don't have answers
- Respond positively when others point out your errors
- Demonstrate learning from feedback

Even Gandalf, the wisest member of the Fellowship, openly acknowledged the limits of his knowledge and power. His willingness to say "I do not know" created space for others to admit uncertainty without shame.

3. Model Curiosity

Questions create safety more effectively than definitive statements:

- Ask for input before giving your opinion
- Respond to ideas with genuine curiosity rather than immediate judgment
- Probe deeper into different perspectives
- Show interest in the thinking process, not just conclusions

The Council of Elrond that formed the Fellowship exemplified this approach. Multiple perspectives were heard, questions were explored, and the final plan emerged through collective thinking rather than top-down directives.

4. Establish Norms Explicitly

Don't leave team expectations to chance. Deliberately discuss and agree on team behaviors around:

- How members communicate disagreement
- How information is shared
- How mistakes are handled
- How decisions are made
- How conflicts are resolved

The most effective teams revisit these norms regularly, especially when new members join or circumstances change.

Maintaining Safety Through Actions

Once initial safety is established, your day-to-day behaviors either strengthen or erode it:

1. Respond Productively to Failure and Ideas

Your reaction when someone fails or presents a seemingly impractical idea sets the tone for future risk-taking:

Safety-destroying responses:

- Criticism without appreciation
- Dismissive body language
- Blaming or embarrassing the person
- Jumping to solutions without understanding

Safety-building responses:

- Thanking people for raising issues
- Showing genuine interest in their thinking
- Separating the idea from the person
- Exploring possibilities before limitations

When Pippin foolishly alerted enemies to their presence in Moria, he wasn't expelled from the Fellowship or permanently shamed. The mistake was addressed, then the focus shifted to moving forward together.

2. Hold Space for Divergent Thinking

Innovative teams need both convergent thinking (narrowing options) and divergent thinking (expanding possibilities). Create explicit space for each:

- Begin problem-solving with open exploration before driving to solutions
- Designate specific meetings or sessions for creative thinking

- Use structured methods like "Yes, and..." rather than "Yes, but..."
- Separate idea generation from idea evaluation

The Council of Elrond demonstrates this approach—first exploring many options (including using the Eagles, hiding the Ring, or destroying it through other means) before converging on the final plan.

3. Practice Inclusivity Beyond Good Intentions

Psychological safety requires more than just saying everyone's welcome:

- Notice whose voices are heard less often and actively invite their input
- Recognize and address interruptions or idea appropriation
- Create multiple channels for contribution (not just favoring the loudest or most extroverted)
- Acknowledge all contributions, even if not ultimately acted upon

The Fellowship included representatives from all the free peoples of Middle Earth—Elves, Dwarves, Humans, and Hobbits. Each brought unique perspectives essential to the mission's success.

Repairing Safety When It's Broken

Even in the best teams, psychological safety can be damaged. When this happens:

1. Acknowledge the Breach Directly

Don't pretend nothing happened or hope people will "just get over it":

- Name the incident without minimizing its impact
- Take responsibility for your contribution to the problem
- Express genuine regret for the damage to trust
- Ask for input on how to repair the situation

2. Demonstrate Changed Behavior

Apologies without behavior change quickly erode trust further:

- Identify specific actions that will be different going forward

- Follow through consistently on these commitments
- Ask for feedback on your progress
- Accept that rebuilding trust takes time

3. Create New Positive Experiences

While addressing problems directly, also create opportunities for positive team interactions:

- Collaborative activities that leverage diverse strengths
- Shared challenges that require mutual support
- Celebrations of collective achievements
- Informal connections that strengthen relationships

Even after the Fellowship physically separated, the bonds of trust enabled continued collaboration toward their shared goal. Members who hadn't initially connected deeply (like Legolas and Gimli) developed profound respect through shared experience.

Finding Complementary Skill Sets

Beyond psychological safety, effective teams require the right mix of capabilities. The Fellowship principle isn't about assembling identical members but about bringing together complementary skills that collectively address the challenge at hand.

The Capability Audit

Before building or expanding a team, conduct a thorough capability audit:

1. Mission-Critical Skills

What specific technical or functional capabilities are essential for the team's purpose?

For the Fellowship, these included:

- Combat abilities (Aragorn, Boromir, Gimli, Legolas)
- Stealth and agility (Hobbits)
- Magic and wisdom (Gandalf)
- Navigation and survival skills (Aragorn)

In a modern team, these might include programming languages, design expertise, financial analysis, customer insight, or project management capabilities.

2. Process and Coordination Skills

What capabilities enable effective collaboration beyond individual contributions?

The Fellowship needed:

- Leadership and decision-making (Gandalf, Aragorn)
- Relationship-building across differences (Frodo)
- Emotional support and morale (Sam, Pippin, Merry)
- Communication across languages and cultures (multilingual members)

Today's teams similarly need facilitation, documentation, feedback management, and other coordination capabilities to function effectively.

3. Growth and Adaptation Skills

What capabilities help the team learn and evolve over time?

The Fellowship demonstrated:

- Learning from failure (after Moria)
- Adapting to changing circumstances (after separation)
- Integrating new information (about alternative routes)
- Developing new capabilities during the journey

Modern teams need similar learning agility to navigate changing business environments and evolving challenges.

The Complementarity Principle

Effective teams don't just collect skills—they assemble combinations where members' strengths and weaknesses offset each other:

1. Knowledge Complementarity

Team members bring different domains of expertise and information:

- Technical versus contextual knowledge
- Depth in specific areas versus breadth across domains
- Historical perspective versus fresh approaches
- Internal versus external perspectives

2. Cognitive Complementarity

Members approach problems through different thinking styles:

- Analytical versus intuitive
- Detail-oriented versus big-picture
- Risk-averse versus risk-tolerant
- Linear versus lateral thinking

3. Work Style Complementarity

Members bring different approaches to getting things done:

- Planning versus improvising
- Process-focused versus outcome-focused
- Relationship-oriented versus task-oriented
- Quality-driven versus speed-driven

The Fellowship exemplified these complementarities. Gandalf's wisdom balanced Pippin's impulsivity. Gimli's bluntness complemented Legolas's diplomacy. Boromir's boldness offset Frodo's caution.

For your teams, the goal isn't eliminating differences but harnessing them productively. This requires:

- Explicit discussion of different working styles
- Appreciation for the value various approaches bring
- Systems that leverage diversity rather than forcing conformity
- Leaders who can integrate different perspectives

Assessing for Both Capability and Culture

When adding team members, evaluate not just skills but also cultural contribution:

1. Beyond the Resume

Look past formal qualifications to evidence of:

- Learning agility and adaptability
- Collaboration across differences
- Resilience during setbacks
- Growth from feedback
- Initiative beyond job descriptions

2. Values Alignment with Space for Difference

Seek people who share core values but bring diverse perspectives:

- Alignment on fundamental mission and ethics
- Similar standards of excellence and integrity
- Complementary approaches and viewpoints
- Different backgrounds and experiences

3. Motivation Beyond Compensation

Identify candidates driven by intrinsic connection to the work:

- Genuine interest in the problem space
- Desire to develop mastery in relevant areas
- Alignment with purpose beyond pragmatic benefits
- Drive for meaningful impact

Remember how the Fellowship was formed? Each member freely chose to join, driven by different but compatible motivations—from Aragorn's destiny to Sam's loyalty, from Legolas's sense of responsibility to Gimli's desire to represent his people.

When I built the support team in Utah, I prioritized hiring for learning agility and intrinsic motivation over specific technical skills. We hired people from diverse backgrounds—retail, education, even cake decoration—who brought different perspectives but shared values around customer care and continuous improvement. The team's complementary capabilities allowed us to solve complex problems no individual could have addressed alone.

When to Recruit New Members

Team composition isn't static. Knowing when and how to bring in new members is crucial for long-term effectiveness.

Signs Your Team Needs New Capabilities

Watch for these indicators that your current team may need additional members:

1. Capability Gaps

Specific skills or knowledge areas consistently create bottlenecks:

- Team regularly needs to seek external expertise
- Certain types of work always take longer than expected
- Quality issues concentrate in particular domains
- Team members express frustration about lacking specific skills

2. Workload Imbalances

Work distribution shows persistent patterns of overload:

- Certain team members consistently work longer hours
- Some skills are in constant demand while others are underutilized
- Critical paths always run through the same few people
- Fast response depends on specific individuals being available

3. Perspective Limitations

Team thinking shows signs of homogeneity or blind spots:

- Similar solutions proposed for different problems
- Recurring feedback from stakeholders about missing considerations
- Team members agree too quickly without exploring alternatives
- Certain types of failures or challenges keep surprising the team

4. Team Energy Patterns

The social dynamics indicate need for new influence:

- Conversations feel predictable and circular
- Innovation and creative thinking have plateaued
- Same conflicts resurface without resolution
- Team energy and engagement are declining

When Boromir fell at Amon Hen, the Fellowship faced a critical capability gap. Though they had already separated physically, they adapted by forming new partnerships and bringing additional capabilities into their extended network—from Faramir to Éowyn to Treebeard.

The Integration Challenge

Adding new members always temporarily decreases team performance as relationships and workflows adjust. Minimize this dip through thoughtful onboarding:

1. Prepare Before They Arrive

Before the new member joins:

- Clarify their role and how it relates to others
- Prepare existing team members for the change
- Document critical context and knowledge
- Create a structured onboarding plan
- Identify an integration partner or buddy

2. Focus on Belonging First

In the earliest days:

- Prioritize relationship-building over immediate productivity
- Create opportunities for informal connection
- Share team history, inside jokes, and context
- Explicitly welcome questions and learning
- Celebrate small wins and contributions

3. Transfer Knowledge Systematically

Beyond initial orientation:

- Break down complex knowledge into digestible modules
- Use paired work for hands-on skill transfer
- Create safe practice opportunities before high-stakes work
- Provide context behind processes, not just steps to follow
- Schedule regular check-ins to identify knowledge gaps

4. Accelerate Contribution

Help new members add value quickly:

- Identify early projects with visible outcomes
- Create opportunities to share their fresh perspective
- Introduce them strategically to key stakeholders
- Deliberately seek their input in team discussions
- Provide specific, timely feedback on their contributions

At Affirm, we developed a "First 30 Days" plan for every new team member, with explicit milestones for relationship building, knowledge acquisition, and initial contributions. The plan included scheduled touchpoints with key collaborators, shadowing opportunities, and gradually increasing responsibility. This structured approach reduced the typical productivity dip and accelerated time to full contribution.

The Fellowship Principle in Action

Let's examine how the Fellowship principle applies in different team contexts:

Permanent Teams

For stable, ongoing teams (like departments or function-based teams):

1. Skills Evolution Planning

Map both current capabilities and future needs:

- Regular skills inventories and gap analyses
- Individual development plans aligned with team needs
- Rotation of responsibilities to build versatility

- Strategic recruitment for both current and anticipated gaps

2. Relationship Maintenance

Invest in ongoing relationship health:

- Regular retrospectives beyond just work outcomes
- Team rituals that reinforce connection
- Deliberate conflict resolution when tensions arise
- Celebration of both team and individual achievements

3. Purpose Reconnection

Maintain alignment with evolving purpose:

- Regular revisiting of team mission and goals
- Connection of daily work to broader impact
- Stories and examples of meaningful outcomes
- Discussion of how purpose adapts to changing contexts

Project Teams

For temporary teams assembled for specific initiatives:

1. Deliberate Formation

Design team composition strategically:

- Explicit mapping of project needs to required capabilities
- Consideration of collaboration history and dynamics
- Balance between project-specific expertise and fresh perspective
- Clear roles with appropriate overlap for resilience

2. Accelerated Bonding

Create conditions for quick trust-building:

- Immersive kickoff experiences
- Structured personal sharing beyond work identities

- Early challenges that require mutual support
- Explicit discussion of working styles and preferences

3. Transition Planning

Prepare for eventual team dissolution:

- Knowledge transfer throughout the project, not just at the end
- Documentation of decisions and learning
- Celebration of collective accomplishments
- Thoughtful reintegration into permanent teams or new projects

Virtual and Hybrid Teams

For teams working across distances and time zones:

1. Communication Architecture

Design interaction patterns intentionally:

- Clarity about synchronous versus asynchronous work
- Multiple communication channels for different purposes
- Regular rhythm of connection points
- Deliberate documentation to support asynchronous coordination

2. Relationship Investment

Work harder to build connections across distance:

- More explicit relationship-building activities
- Higher ratio of personal to task communication
- Virtual social experiences that transcend work focus
- In-person gatherings strategically scheduled when possible

3. Presence Equity

Ensure all members have similar influence regardless of location:

- Equal access to information and decisions

- Deliberate inclusion of remote voices in discussions
- Attention to timezone burdens and rotation of inconvenience
- Technology choices that level the participation field

When I managed teams split between San Francisco and Utah, we created "virtual windows" between offices—always-on video connections that allowed spontaneous interaction. We also established "location-neutral meetings" where everyone joined from their own device even when some were in the same physical location, creating participation equity.

Culture Matters More Than Perks

As we explore building effective teams, it's essential to distinguish between culture and perks. Many organizations confuse the two, focusing on superficial benefits rather than foundational dynamics.

Culture vs. Perks: Understanding the Difference

Perks are tangible benefits provided to employees:

- Free food and beverages
- Game rooms and recreational facilities
- Flexible work schedules
- Generous time off policies
- Wellness programs and gym memberships

Culture is how it feels to work somewhere—the patterns of behavior that determine day-to-day experience:

- How decisions get made
- How conflicts get resolved
- How mistakes get handled
- How success gets defined and celebrated
- How people treat each other under pressure

Perks can signal cultural values, but they don't create culture. A ping-pong table doesn't build collaboration. Catered lunches don't generate psychological safety. Unlimited vacation doesn't ensure work-life integration if the unwritten expectation is that no one actually takes time off.

The Fellowship didn't succeed because of perks (though Elven bread was certainly convenient). They succeeded because of cultural patterns—how they made decisions together, supported each other through challenges, adapted to changing circumstances, and maintained focus on their shared purpose.

The Elements of Team Culture

Effective team culture comprises several interrelated elements:

1. Shared Values in Action

Not just stated values, but values demonstrated through consistent behaviors:

- What gets prioritized when resources are limited
- What behaviors get recognized and rewarded
- What actions receive constructive correction
- What compromises are considered unacceptable

For the Technical Account Management team at Affirm, we established "customer advocacy with business mindfulness" as a core value. This meant we would vigorously represent customer needs internally while maintaining awareness of business realities. We demonstrated this value by celebrating both customer wins and instances where team members found creative solutions that served both customer and company needs.

2. Communication Patterns

How information flows shapes team dynamics profoundly:

- Transparency versus need-to-know approaches
- Direct versus indirect feedback
- Psychological safety around dissenting views
- Balance between listening and advocacy

- Inclusivity in who speaks and who gets heard

The Fellowship developed communication patterns where each member could speak openly, questions were welcomed, and decisions incorporated diverse perspectives. Even the smallest members (the Hobbits) had equal voice in critical conversations.

3. Decision Rights and Processes

Clarity about how decisions happen and who holds authority:

- Which decisions require consensus versus consultation
- Where different team members have autonomy
- How disagreements get resolved
- How decisions get communicated and implemented
- How past decisions can be revisited when needed

As the Fellowship's journey progressed, decision rights evolved. Initially, Gandalf provided primary direction. After his fall in Moria, Aragorn stepped into leadership but maintained a collaborative approach suited to the team's established culture.

4. Learning Orientation

How the team approaches growth and improvement:

- Attitude toward mistakes and failures
- Investment in individual and collective development
- Openness to external perspectives and feedback
- Balance between execution and reflection
- Knowledge sharing versus knowledge hoarding

The Fellowship continuously learned and adapted throughout their journey. When one approach failed, they pivoted to alternatives. When they encountered new information, they integrated it into their planning. When they faced unexpected challenges, they developed new capabilities to address them.

Cultivating Deliberate Culture

Culture forms whether you shape it intentionally or not. Deliberate culture-building includes:

1. Define Desired Culture Explicitly

Articulate the cultural attributes you want to develop:

- Identify 3-5 key cultural principles
- Define what each looks like in observable behaviors
- Contrast with counter-examples for clarity
- Connect cultural elements to team purpose and success

2. Model from the Top

Demonstrate cultural values through leadership behavior:

- Align your actions with stated cultural principles
- Acknowledge when you fall short of cultural ideals
- Make culture-based decisions even when difficult
- Tell stories that reinforce cultural values

3. Hire and Promote for Cultural Contribution

Consider cultural impact in personnel decisions:

- Include culture-fit (not sameness) in hiring criteria
- Promote individuals who exemplify desired culture
- Address behaviors that undermine cultural values
- Recognize and celebrate cultural champions

4. Create Rituals That Reinforce Culture

Establish regular practices that embody your cultural principles:

- Meeting formats that reflect how you want to work
- Recognition approaches that highlight valued behaviors
- Onboarding processes that transmit cultural elements
- Team traditions that strengthen connection to shared values

When building the Utah support team, we created a weekly ritual called "Customer Heroes"—sharing stories of team members who went above and beyond to solve customer problems. This simple practice reinforced our cultural value of customer advocacy more effectively than any policy manual could have.

Conclusion: Your Own Fellowship

Building an effective team isn't about finding identical individuals or creating perfect harmony. It's about bringing together diverse capabilities within a culture of psychological safety, shared purpose, and mutual respect.

The Fellowship of the Ring worked because it embraced differences while maintaining alignment on what mattered most. Its members didn't always agree, didn't always stay physically together, and didn't always execute flawlessly. But they created conditions where each person could contribute their unique strengths toward a common goal.

As you build and lead your own teams, remember:

1. Psychological safety creates the foundation for everything else.

2. Complementary skills achieve what homogeneity cannot.

3. Deliberate integration helps new members contribute quickly.

4. Intentional culture matters more than superficial perks.

5. Shared purpose provides direction when challenges arise.

The manager who applies these Fellowship principles creates teams that are more than the sum of their parts—teams capable of facing challenges that would defeat even the most talented individuals working alone.

In the next chapter, we'll explore how to lead these Fellowship-style teams through the inevitable changes and uncertainties that all organizations face.

CHAPTER 11: Managing Through Change and Uncertainty

AI, Automation, and the Future of Work

"Will AI take my job?"

This question echoes through offices, Slack channels, and late-night worry sessions across industries. It's not a new anxiety—technological disruption has sparked similar concerns throughout history, from the industrial revolution to the dawn of personal computing. But the pace and scope of current AI advances make this moment feel different.

As a manager, you're caught in the middle of this transformation. You're responsible for implementing new technologies while supporting the humans on your team through the resulting changes. You need to embrace innovation without sacrificing the human elements that make work meaningful. You must prepare your team for an uncertain future when you can't fully predict that future yourself.

Let's start with some grounding truths about AI and automation in the workplace:

The Reality Check

First, let's separate fact from fear:

AI will absolutely change work. Tools like large language models, computer vision systems, and predictive analytics are already transforming how we approach everything from writing to design to data analysis.

AI will absolutely not wholesale replace humans. While AI excels at specific tasks within defined parameters, it falls short in the most valuable aspects of work: understanding actual human needs, making nuanced judgments about complex situations, and knowing when to break established patterns because the context demands it.

As I explain to anxious clients: AI doesn't replace software engineers; it changes how software engineers work. It doesn't replace designers; it shifts what designers focus on. It doesn't replace managers; it transforms what managers spend their time doing.

Think of AI as a power tool. Power tools didn't eliminate carpenters but rather changed what and how much they could accomplish. AI is similar—it automates certain cognitive tasks while creating new possibilities for human contribution.

The Historical Perspective

This isn't the first time we've faced technological disruption of work. Consider these historical patterns:

- Automation typically eliminates tasks, not entire jobs. Most roles consist of diverse responsibilities, only some of which can be automated at any given time.

- Technology creates new roles we couldn't previously imagine. Who predicted social media managers, user experience designers, or machine learning ethicists decades ago?

- The nature of work shifts rather than disappears. Spreadsheets didn't eliminate accountants; they shifted accounting work from calculation to analysis and strategy.

When I worked at a logistics API company, automation was going to make the warehouse a "lights-off" (all-robots) facility. What actually happened? The nature of warehouse work shifted. Some repetitive physical tasks became automated, but new roles emerged around robot maintenance, exception handling, and process optimization.

Your Real Competitive Advantage

In an age of increasingly capable AI, humans maintain several crucial advantages:

1. Contextual Understanding

The ability to grasp the full situation, including unstated needs, emotional factors, and complex interdependencies.

2. Ethical Judgment

Making value-based decisions that consider impacts beyond metrics—weighing tradeoffs that resist simple optimization.

3. Creative Synthesis

Combining ideas across domains, making unexpected connections, and generating truly novel approaches rather than recombining existing patterns.

4. Authentic Connection

Building genuine relationships based on empathy, shared experiences, and mutual understanding that foster trust and psychological safety.

5. Adaptability to Novelty

Navigating truly new situations without prior training data, developing approaches for unprecedented challenges.

These uniquely human capabilities become more valuable, not less, as routine cognitive tasks become automated.

The Augmented Professional

Rather than asking which jobs will disappear, a more productive question is: How will various roles evolve in partnership with AI and automation?

The most successful professionals will develop an "augmented" approach that combines human strengths with technological capabilities:

From Knowledge Retention to Knowledge Navigation

Less emphasis on memorizing information, more on knowing how to find, evaluate, and apply relevant knowledge.

From Routine Production to Exception Handling

Less time spent on standard cases, more focus on complex situations requiring judgment and creativity.

From Isolated Decisions to Algorithmic Oversight

Less independent decision-making, more evaluation and refinement of algorithm-suggested approaches.

From Technical Execution to Human-Centered Design

Less focus on implementation details, more attention to understanding needs and shaping appropriate solutions.

One of my senior developer clients initially feared AI coding assistants would make his skills obsolete. After experimenting with these tools, he discovered they handled routine coding tasks efficiently while freeing him to focus on architecture, mentoring junior developers, and deeper problem-solving—all areas where his experience created more value than before.

How to Future-Proof Your Management Style

As a manager, your role will evolve significantly in response to technological and workplace changes. Certain management approaches will become obsolete, while others will become increasingly valuable.

Management Functions Ripe for Transformation

Some traditional management functions will be substantially altered by technology:

1. Information Aggregation and Reporting

AI systems increasingly automate data collection, analysis, and basic reporting.

Future-proof approach: Shift from producing reports to interpreting implications, identifying patterns human analysts might miss, and connecting data insights to strategic decisions.

2. Basic Performance Monitoring

Automated systems can track quantitative metrics and flag deviations from expected patterns.

Future-proof approach: Focus on qualitative assessment, context-specific interpretation of metrics, and understanding the human factors affecting performance.

3. Routine Task Assignment and Tracking

Project management tools with AI capabilities can handle straightforward task allocation and progress monitoring.

Future-proof approach: Concentrate on matching complex work to individual strengths, addressing interdependencies between tasks, and helping team members navigate ambiguity.

4. Standard Knowledge Distribution

Information repositories and learning platforms increasingly deliver standardized knowledge efficiently.

Future-proof approach: Emphasize contextualizing information for specific situations, connecting disparate knowledge areas, and helping team members develop judgment about when and how to apply knowledge.

Increasingly Valuable Management Capabilities

As routine aspects of management become automated, other capabilities become more critical:

1. Cultivating Human Potential

Creating conditions where people develop skills, judgment, and creative capabilities that complement rather than compete with automation.

Key practices:

- Identifying emerging capabilities team members should develop
- Creating learning experiences that build contextual understanding
- Coaching for adaptability and continuous growth

- Helping team members find meaningful contribution amidst changing work

2. Navigating Ethical Complexity

Addressing the nuanced ethical questions that arise as technology reshapes work and impacts various stakeholders.

Key practices:

- Facilitating discussions about potential impacts of technological changes
- Balancing efficiency gains against human and social considerations
- Developing ethical frameworks specific to your team's context
- Advocating for responsible approaches when implementing new technologies

3. Cross-Boundary Integration

Connecting people, ideas, and systems across traditional organizational boundaries.

Key practices:

- Building relationships that span functional and hierarchical divides
- Translating between technical and non-technical perspectives
- Identifying how specialized capabilities can combine to address complex challenges
- Creating forums for cross-disciplinary collaboration

4. Purpose Alignment

Helping teams maintain connection to meaningful purpose amid constant change.

Key practices:

- Regularly revisiting and refreshing team purpose
- Connecting daily work to larger impact and meaning
- Finding authentic purpose even in transformed role responsibilities
- Creating space for team members to shape how purpose gets expressed

At Affirm, I worked with a team whose reporting functions were largely automated by new analytics tools. Rather than becoming obsolete, the team's manager redirected

focus toward interpreting what the data meant for different stakeholders and facilitating cross-functional discussions about implications. The team's value increased because they helped the organization make sense of information rather than merely producing it.

Developing Future-Ready Management Skills

How do you prepare for this evolving landscape? Focus on developing these meta-capabilities:

1. Technological Fluency Without Specialization

Understand technological capabilities and limitations without trying to match specialist expertise.

Development approaches:

- Regular hands-on exploration of emerging tools
- Relationships with technical experts who can provide perspective
- Focus on use cases and implications rather than implementation details
- Attention to patterns across different technologies

2. Learning Agility

Develop systematic approaches to acquiring new capabilities quickly.

Development approaches:

- Regular reflection on your learning process
- Deliberate practice in unfamiliar domains
- Building learning networks across diverse fields
- Creating feedback loops that accelerate skill development

3. Comfort with Ambiguity

Build capacity to function effectively with incomplete information and unclear outcomes.

Development approaches:

- Mindfulness practices that develop presence amid uncertainty
- Reflection on past experiences navigating ambiguous situations
- Deliberate exposure to uncertain situations in lower-stakes contexts
- Study of complex adaptive systems and decision-making under uncertainty

4. Adaptive Communication

Develop versatile communication approaches that work across changing contexts.

Development approaches:

- Practice communicating complex ideas to diverse audiences
- Feedback on communication effectiveness in various situations
- Study of communication patterns in different fields and cultures
- Development of communication frameworks that adapt to context

When I coach managers preparing for technological disruption, we focus on these meta-capabilities rather than specific technical skills. The latter quickly become outdated, while the former provide ongoing adaptability as the landscape continues to evolve.

Adapting to New Paradigms

Beyond technological change, management must adapt to broader paradigm shifts in how work happens. These shifts include:

1. From Sequential to Concurrent Development

Traditional approach: Complete one phase before beginning the next, with clear handoffs between specialized teams.

Emerging paradigm: Parallel workstreams with continuous integration, requiring constant coordination and rapid feedback cycles.

Management implications:

- Less emphasis on detailed upfront planning
- Greater need for real-time coordination mechanisms

- More attention to integration points and dependencies
- Increased importance of shared understanding across workstreams

2. From Hierarchical to Networked Organization

Traditional approach: Clear reporting lines with information and decisions flowing up and down defined chains of command.

Emerging paradigm: Fluid networks of relationships where information and influence flow through multiple channels based on need rather than formal structure.

Management implications:

- Less reliance on positional authority
- Greater emphasis on influence without direct control
- More attention to relationship development and maintenance
- Increased need for transparency and information accessibility

3. From Stable to Adaptive Planning

Traditional approach: Develop comprehensive plans and execute against them with minimal deviation.

Emerging paradigm: Create directional strategies with frequent reassessment and adjustment based on emerging information.

Management implications:

- Less emphasis on prediction and control
- Greater need for sensing mechanisms that detect needed adjustments
- More deliberate distinction between fixed commitments and flexible approaches
- Increased attention to building adaptability into systems and processes

4. From Local to Distributed Collaboration

Traditional approach: Teams primarily work together physically, with remote work as an occasional exception.

Emerging paradigm: Collaboration across geographic, temporal, and organizational boundaries is the norm rather than exception.

Management implications:

- Less reliance on physical presence for coordination and culture building
- Greater need for explicit communication practices and documentation
- More attention to creating equitable participation across locations
- Increased importance of asynchronous collaboration methods

These paradigm shifts require fundamental adjustments in management approach rather than simply applying traditional methods in new contexts. The manager who recognizes and adapts to these shifts will be better positioned to lead effectively through ongoing change.

When I helped the logistics company transition from a traditional waterfall product development process to a more concurrent approach, the biggest challenge wasn't the new methodology itself but the underlying mindset shift. Managers accustomed to comprehensive planning and sequential work struggled with the constant adjustment and integration required by the new paradigm. The most successful managers were those who embraced the opportunity to develop new coordination capabilities rather than trying to force the new approach into old mental models.

The Real Skills Technology Can't Replace

As we navigate technological disruption and paradigm shifts, certain fundamental human capabilities become increasingly valuable—and increasingly difficult to automate. These are the skills worth deliberately cultivating in yourself and your team.

1. Complex Communication

Machines excel at generating language, but struggle with the nuanced interpretation and response that characterize meaningful human communication:

Core capabilities:

- Reading subtle emotional signals and unstated needs

- Adapting communication style to different audiences and contexts
- Handling sensitive conversations with appropriate empathy
- Facilitating dialogue across differing perspectives and experiences

Development approaches:

- Practice active listening without immediately formulating responses
- Seek feedback on communication effectiveness from diverse perspectives
- Study frameworks for difficult conversations and conflict resolution
- Develop awareness of your own communication tendencies and blind spots

When automation took over routine customer communication at the logistics company, the support team's value increasingly came from handling complex exceptions where customers needed more than information—they needed understanding, creative problem-solving, and sometimes just empathetic acknowledgment of their frustration. The best agents developed an intuitive sense for when to follow standard protocols and when a situation required more personalized attention.

2. Contextual Problem-Solving

While AI excels at solving well-defined problems with clear parameters, humans retain an edge in messy, context-dependent situations:

Core capabilities:

- Identifying the real problem beneath presenting symptoms
- Considering broader implications beyond immediate solutions
- Navigating conflicting priorities and values
- Applying judgment about when to follow versus break standard approaches

Development approaches:

- Analyze past complex problems to identify pattern recognition shortcuts
- Practice "second-order thinking" about solution consequences
- Expose yourself to diverse problem contexts to build transferable insights
- Develop frameworks for ethical decision-making in ambiguous situations

A manager I coached at a financial technology company initially feared that automated decision systems would eliminate the need for human underwriters. What actually emerged was a hybrid approach where algorithms handled standard cases while human underwriters focused on exceptions requiring judgment—situations where rigid rules might miss legitimate opportunities or fail to identify subtle risks. The most valuable underwriters became those who could meaningfully review algorithm recommendations and identify when contextual factors justified different decisions.

3. Purpose Cultivation

Technology can optimize for defined objectives but struggles with the inherently human process of determining what objectives matter and why:

Core capabilities:

- Connecting daily activities to meaningful impact
- Helping others find personal significance in collective work
- Navigating tensions between competing values and purposes
- Adapting purpose expression as circumstances change

Development approaches:

- Regular reflection on what genuinely matters to you and why
- Exploration of how different team members connect to shared purpose
- Study of how purpose manifests across different organizations and contexts
- Practice articulating purpose in ways that resonate with diverse perspectives

At Affirm, the introduction of automated loan processing created initial anxiety among team members who feared their role would become mechanical and disconnected from the company's purpose of improving financial access. The most effective managers helped their teams reconnect to purpose by emphasizing how human oversight ensured the technology served customers fairly and identifying opportunities to apply human judgment in ways that better fulfilled the mission.

4. Creative Synthesis

AI can generate variations based on patterns in training data but struggles with true innovation that connects previously unrelated domains:

Core capabilities:

- Combining ideas from disparate fields into novel approaches
- Identifying meaningful patterns across apparently unrelated situations
- Reimagining assumptions that constrain current thinking
- Translating concepts from one domain to application in another

Development approaches:

- Deliberate exposure to diverse fields and perspectives
- Practice identifying the underlying principles in different contexts
- Exploration of historical innovations and their cross-domain origins
- Techniques for suspending judgment to allow unexpected connections

I worked with a product team that initially used AI tools merely to optimize existing features based on usage patterns. Their breakthrough came when they stopped asking "How can we improve what exists?" and started asking "What currently separate capabilities might create something entirely new if combined?" This synthesis thinking led to innovative features that competitors couldn't easily replicate because they emerged from creative human insight rather than optimization algorithms.

5. Relationship Building

While technology facilitates connection, the ability to build authentic relationships based on mutual understanding remains distinctly human:

Core capabilities:

- Creating psychological safety through genuine presence
- Understanding others' unstated needs and motivations
- Building trust through consistent, values-based behavior
- Navigating relationship repair after misunderstandings or conflicts

Development approaches:

- Practice full attention during interactions without digital distraction
- Study relationship dynamics across different contexts and cultures
- Seek feedback on how your behavior impacts others' experience
- Develop comfort with appropriate vulnerability and boundary-setting

When the logistics company implemented a chatbot for routine customer inquiries, they discovered an interesting pattern: customers who had previously established relationships with human agents were more forgiving of occasional technical issues and more loyal overall. This led to a hybrid approach where automation handled transactional interactions while human agents invested in relationship-building conversations at key moments in the customer journey.

Managing Through Uncertainty

Beyond specific technological disruptions, today's managers must navigate fundamental uncertainty—situations where you can't reliably predict outcomes or even identify all relevant variables. This reality requires specific approaches that differ from traditional management methods designed for stable, predictable environments.

The Uncertainty Mindset

Effective management through uncertainty starts with the right mindset—a way of thinking that embraces rather than resists ambiguity:

1. From Control to Influence

Accept that complete control is rarely possible; focus instead on influencing direction through consistent principles and adaptive actions.

2. From Prediction to Preparation

Rather than trying to predict exactly what will happen, prepare for multiple possible scenarios while building general resilience.

3. From Perfect Plans to Directional Navigation

Move from detailed roadmaps to directional guidance with frequent recalibration based on emerging information.

4. From Avoiding Mistakes to Learning Through Iteration

See missteps as valuable data rather than failures, using each iteration to improve understanding and approach.

One tech company I worked with replaced their annual planning process with quarterly "directional bets"—focused investments in specific areas with explicit learning goals rather than fixed outcome targets. Each quarter, they assessed what they'd learned and adjusted their bets accordingly. This approach allowed them to respond to unexpected market developments more effectively than competitors locked into rigid annual plans.

Practical Frameworks for Uncertainty Navigation

Beyond mindset, specific frameworks can help teams navigate uncertainty more effectively:

1. Minimum Viable Clarity

Identify the minimum agreements needed for coordinated action while leaving space for adaptation:

- Essential agreements: What few core principles or constraints must everyone honor?
- Decision rights: Who can make which types of decisions without additional approval?
- Learning mechanisms: How will we capture and share insights from our experiences?
- Coordination touchpoints: What minimal synchronization is needed to prevent chaos?

At the logistics company, shipping integration projects often faced significant uncertainty due to client system quirks discovered mid-implementation. Rather than detailed upfront plans, successful teams focused on establishing clear interfaces

between components, regular integration checkpoints, and explicit decision rights for handling unexpected issues. This minimum viable clarity allowed autonomous problem-solving while maintaining overall alignment.

2. Options-Based Planning

Rather than committing to single approaches, develop portfolios of options that can be activated as circumstances evolve:

- No-regret moves: Actions valuable under any plausible scenario
- Option creation: Investments that create future possibilities without full commitment
- Reversible decisions: Choices that can be changed with acceptable cost if needed
- Delayed commitments: Decisions intentionally postponed until better information emerges

One financial services team I advised used this approach when faced with uncertain regulatory changes. They identified core capabilities needed regardless of specific regulations, created flexible implementation options for different regulatory scenarios, and delayed certain architecture decisions until the regulatory direction became clearer. This balanced progress with adaptability more effectively than either rushing ahead or waiting for complete certainty.

3. Probe-Sense-Respond

For highly unpredictable situations, use small experiments to generate information before larger commitments:

- Safe-to-fail probes: Small experiments designed to generate learning
- Pattern detection: Regular assessment of emerging information without premature conclusion
- Amplify/dampen: Strengthen approaches that show promise, reduce investment in less effective ones
- Diverse approaches: Maintain multiple strategies until clear patterns emerge

When Affirm explored expansion into new financial products, they faced significant uncertainty about customer needs and regulatory considerations. Rather than a single large launch, they created small "probe" offerings with limited customers, using diverse approaches to test different aspects of the market. These probes generated essential insights that shaped a more successful full launch strategy.

4. Robust-Yet-Adaptive Planning

Develop core plans that withstand reasonable variation while building in adaptation mechanisms:

- Stable core: Identify elements unlikely to change regardless of scenario
- Flex points: Explicitly design where and how plans can adapt
- Trigger conditions: Establish clear signals that will prompt reassessment
- Contingency plans: Prepare specific responses to foreseeable challenges

A retail team I worked with used this approach for seasonal merchandise planning amid supply chain uncertainties. They committed early to core products with stable demand while creating flex capacity for trend-responsive items. They established specific inventory triggers that would activate contingency plans (alternative sourcing, pricing adjustments, or promotion strategies) without requiring constant replanning.

Communicating Through Uncertainty

How you communicate becomes especially crucial when navigating uncertainty:

1. Balancing Confidence and Humility

Team members need both reassurance and realism:

- Express confidence in collective capabilities while acknowledging unknowns
- Distinguish between what's known, what's assumed, and what's unknown
- Model comfort with saying "I don't know—here's how we'll figure it out"
- Emphasize progress and learning even amid setbacks

2. Creating Meaning Amid Ambiguity

Help team members connect to purpose when paths are unclear:

- Regularly reinforce why the work matters beyond specific outcomes
- Celebrate learning and capability development, not just achievement
- Connect current challenges to meaningful team narratives and values
- Create space for team members to find personal meaning in collective work

3. Right-Sizing Transparency

Share enough information without overwhelming:

- Provide context that helps team members make good local decisions
- Distinguish between productive and unproductive uncertainties
- Create appropriate "worry boundaries" so concerns have the right scope
- Balance honesty about challenges with focus on agency and possibility

At the logistics company during a period of potential acquisition, the most effective managers neither pretended to have answers nor flooded teams with every rumor. Instead, they clearly communicated what was known and unknown, focused teams on continuing to serve customers excellently regardless of corporate outcome, and created appropriate forums for questions while maintaining regular business rhythms. This approach kept teams productive and engaged despite significant organizational uncertainty.

Case Study: Leading Through Industry Disruption

Let's explore how these principles might apply through a comprehensive case study:

The Situation

Imagine a publishing company facing industry disruption from digital platforms, changing consumer habits, and new content creation technologies. As a senior manager, you lead a division responsible for educational materials—an area experiencing particularly rapid transformation due to emerging technologies.

Your team includes editors with decades of traditional publishing experience alongside newer members with digital backgrounds. Revenue from traditional textbooks is

declining while digital learning platforms show promise but require different capabilities and business models.

Phase 1: Facing Reality Without Panic

Your first challenge is helping the team acknowledge disruption without becoming paralyzed by it:

Actions:

- Conduct a structured assessment of industry trends and their implications
- Create space for honest expression of concerns and emotions
- Develop a shared understanding of threats and opportunities
- Frame the situation as transformation rather than extinction

Results:

- Team moves from denial or panic to engaged problem-solving
- Existing strengths and transferable capabilities become visible
- Collective energy shifts toward possibility rather than protection
- Foundation for strategic direction emerges from shared understanding

Phase 2: Developing Strategic Direction Amid Uncertainty

Rather than a single detailed plan, you develop directional guidance with adaptation mechanisms:

Actions:

- Identify "no-regret moves" valuable in any plausible future
- Create small experiments to test different approaches in the market
- Establish clear learning objectives and feedback mechanisms
- Define decision criteria for scaling successful experiments

Results:

- Investment in platform capabilities that support multiple potential offerings
- Small pilot programs testing different content formats and delivery models

- Regular learning reviews that capture insights across experiments
- Progressive clarity about which approaches show most promise

Phase 3: Building New Capabilities While Leveraging Existing Strengths

You help the team develop new skills while recognizing the continuing value of their core expertise:

Actions:

- Map existing capabilities to emerging needs, identifying bridges
- Create cross-functional pairs that combine traditional and digital expertise
- Develop learning pathways for key transition skills
- Recognize and celebrate both traditional excellence and new capabilities

Results:

- Traditional editors partner with digital designers to create new format content
- Subject matter experts develop data interpretation skills to use learning analytics
- Project managers adapt processes for more iterative, feedback-driven development
- Team culture evolves to value both established quality standards and innovation

Phase 4: Implementing Flexible Operational Models

You restructure operations to support greater adaptability:

Actions:

- Replace rigid annual planning with quarterly priority setting
- Create modular team structures that can reconfigure around changing needs
- Implement technologies that support distributed, asynchronous collaboration
- Establish clear coordination mechanisms while maximizing local autonomy

Results:

- Resources shift more responsively toward promising opportunities

- Teams form, combine, and reconfigure based on emerging priorities
- Work continues effectively despite geographic distribution
- Decision-making becomes more distributed while maintaining alignment

Phase 5: Evolving Leadership Approaches

You adapt your own leadership style to the changing context:

Actions:

- Shift from detailed oversight to establishing guardrails and principles
- Develop comfort with provisional decisions and course corrections
- Build networks of influence beyond traditional reporting relationships
- Model learning agility by developing new skills yourself

Results:

- Team members take greater ownership for decisions within their domains
- Faster adaptation to market feedback without constant replanning
- More effective collaboration across organizational boundaries
- Culture of continuous learning permeates the division

Through this multi-phase approach, you help your team navigate industry disruption not by predicting the exact future of publishing, but by building the capabilities, structures, and mindsets needed to adapt as that future unfolds. The team doesn't just survive disruption—it helps shape the industry's transformation through continuous learning and adaptation.

Conclusion: The Adaptable Manager

Throughout this chapter, we've explored how to manage through technological change and fundamental uncertainty. The core message is that effective management in this environment isn't about predicting the future correctly. It's about developing the agility to adapt as the future reveals itself.

The manager who thrives amid ongoing change:

1. Understands technological trends without falling for either hype or denial
2. Develops future-ready capabilities in themselves and their teams
3. Creates structures and processes that balance stability with adaptability
4. Cultivates distinctly human skills that complement rather than compete with technology
5. Communicates with both confidence and humility when navigating uncertainty

This adaptable approach doesn't mean abandoning stability entirely. Rather, it means being deliberate about what remains stable—typically purpose, values, and certain core practices—while creating purposeful flexibility in other areas.

The good news? The capabilities that make you effective amid uncertainty are learnable. They don't require special talent or prediction abilities—just deliberate practice and the willingness to step beyond comfortable management approaches.

By developing these capabilities in yourself and your team, you create a significant competitive advantage. In a world where change is the only constant, the ability to adapt becomes the ultimate sustainable advantage.

In the next chapter, we'll explore another critical dimension of effective management: the personal growth journey that transforms good managers into truly great ones.

CHAPTER 12: Authenticity Without Career Suicide

Being Yourself While Maintaining Professionalism

For a long time, I made it a point that googling my name wouldn't surface my YouTube channel. Not because it was vastly different from my personality live, or that it was outrageous, but because, as was my common refrain: you can't unshare something.

If sharing the videos resulted in me being seen as unprofessional, less competent, or even antagonistic to business at large, would I be passed up on promotions? Would my team still respect me?

Would clients act differently, as if they had "dirt" on me, by googling my name and finding a pun on the term "stakeholders"? My self-censorship was an act of self-preservation.

This internal debate represents a tension many professionals face: How do you bring your authentic self to work without compromising your professional standing? How do you balance genuine self-expression with the necessary boundaries of workplace norms?

The good news is that authenticity and professionalism aren't opposing forces. At their best, they complement each other, creating trust and impact that neither can achieve alone. The challenge lies in navigating this balance thoughtfully.

The Authenticity Paradox

Let's start by addressing what I call the "authenticity paradox"—the mistaken belief that being authentic means expressing every thought, emotion, or aspect of yourself without filter.

True authenticity in professional contexts doesn't mean unfiltered self-expression. It means showing up as a whole person with consistent values, genuine engagement, and appropriate boundaries. It means being the same person across contexts, even while adapting your expression to different situations.

Think about it this way:

- Inauthenticity: Pretending to be someone you're not
- Inappropriate authenticity: Sharing every thought and feeling without regard for context
- Effective authenticity: Bringing your real values and perspective while respecting contextual norms

When I mentored new managers at Affirm, I noticed they often confused authenticity with oversharing or saw professionalism as putting on a rigid persona. The most effective managers found a middle path—they were genuinely themselves, but with thoughtful boundaries around which aspects of themselves they expressed in different situations.

The Dimensions of Professional Authenticity

Authentic professionalism involves navigating several dimensions:

1. Value Expression

How you demonstrate what matters to you through your work:

- Inauthentic: Advocating for approaches you don't believe in because they seem "corporate"
- Inappropriate: Rejecting valid business concerns because they don't align with your personal values
- Effectively authentic: Finding ways to honor both organizational needs and your core values

I worked with a manager at the logistics company who strongly valued environmental sustainability in her personal life. Rather than either hiding this value or pushing it inappropriately, she found legitimate business cases for reducing waste in operations—connecting her authentic concern to relevant business outcomes.

2. Communication Style

How you express yourself verbally and non-verbally:

- Inauthentic: Adopting corporate jargon that feels foreign to you
- Inappropriate: Using casual language or humor that undermines important messages
- Effectively authentic: Maintaining your natural expression while adapting to professional norms

My own communication style includes humor and storytelling. Early in my career, I tried to suppress these elements in "serious" business contexts, resulting in stiff, forgettable presentations. Later, I learned to incorporate these authentic aspects appropriately—using humor to make points memorable and stories to illustrate concepts, while still maintaining focus on business objectives.

3. Relationship Boundaries

How you connect with colleagues while maintaining appropriate distinctions:

- Inauthentic: Pretending personal connection where none exists
- Inappropriate: Treating professional relationships like personal friendships without boundaries
- Effectively authentic: Building genuine connection within appropriate professional parameters

The Technical Account Management team at Affirm included people with wide-ranging personalities. Some were naturally reserved, others effusively friendly. The most effective team members didn't try to change their natural relationship styles but adjusted the expression to maintain appropriate boundaries. The reserved ones showed genuine interest without forced sociability; the outgoing ones built warm relationships without oversharing.

4. Emotional Expression

How you acknowledge and manage feelings in professional contexts:

- Inauthentic: Pretending emotions don't exist or never showing vulnerability
- Inappropriate: Expressing emotions without regulation or consideration for impact
- Effectively authentic: Acknowledging real feelings while managing their expression appropriately

When the logistics company went through a difficult restructuring, the most trusted leaders didn't pretend everything was fine (inauthentic) or vent their frustrations publicly (inappropriate). Instead, they acknowledged legitimate concerns while focusing on constructive next steps—authentic but appropriate to their leadership roles.

The Professional Authenticity Spectrum

Different workplace contexts allow for different levels of self-expression. Rather than a simple authentic/inauthentic binary, consider a spectrum of appropriate authenticity:

Formal External Representation

When you officially represent your organization to clients, investors, or the public:

- Highest alignment with organizational voice and values
- Most careful consideration of impact
- Clearest boundaries around personal vs. professional

Internal Collaborative Work

When working with colleagues on business objectives:

- Balanced personal style with team and organizational norms
- Authentic perspective within context of shared goals
- Professional relationships with appropriate personal elements

Development and Mentoring Relationships

When focused on growth and learning with colleagues:

- Greater vulnerability about challenges and learning
- More explicit discussion of values and motivations
- Deeper personal connection while maintaining appropriate boundaries

Designated Social Contexts

When participating in explicitly social workplace events:

- More expression of personal interests and background
- Lighter, more casual interaction
- Still mindful of professional impact

Moving effectively across this spectrum doesn't mean being a different person in each context. It means being the same authentic person while adjusting which aspects of yourself you emphasize and how you express them.

The Value of Appropriate Vulnerability

One particularly powerful aspect of authentic leadership is appropriate vulnerability—the willingness to acknowledge limitations, share relevant challenges,

and demonstrate learning. This dimension deserves special attention because it's both impactful and easily misunderstood.

Why Vulnerability Matters

Research consistently shows that appropriate vulnerability from leaders:

- Builds psychological safety for team members
- Creates permission for learning and growth
- Humanizes leadership and reduces unhealthy power dynamics
- Fosters more honest communication throughout the organization

I experienced this firsthand at Affirm when a senior executive openly shared a significant mistake in a strategic decision and what they had learned from it. This single act transformed the organizational culture around failure, creating space for more innovative thinking and honest assessment of results.

The Vulnerability Balance

The key is finding the right balance:

Too little vulnerability leads to:

- Appearance of inauthenticity or lack of self-awareness
- Distance from team members
- Culture of perfectionism that inhibits learning
- Unhealthy power dynamics

Too much vulnerability leads to:

- Undermined confidence in leadership
- Inappropriate emotional burden on team members
- Blurred professional boundaries
- Role confusion

Effective vulnerability focuses on:

- Challenges relevant to work context

- Learning rather than emotional processing
- Appropriate timing and audience
- Balance with demonstrated competence

Types of Professional Vulnerability

Different types of vulnerability serve different leadership purposes:

1. Competence Vulnerability

Acknowledging skill limitations or knowledge gaps:

Effective Example: "I don't have background in this technical area. Can you help me understand the key considerations?"

Ineffective Example: "I have no idea what I'm doing in this role."

The first creates learning opportunity and honors others' expertise; the second undermines basic confidence.

2. Decision Vulnerability

Sharing uncertainty or mistakes in decision-making:

Effective Example: "Looking back, I made the wrong call on the timeline. I underestimated the integration complexity. Next time, I'll involve the technical team earlier in planning."

Ineffective Example: "I completely messed up and now we're all in trouble. I feel terrible about it."

The first demonstrates reflection and learning; the second focuses on emotional processing without constructive direction.

3. Perspective Vulnerability

Revealing when your thinking has evolved:

Effective Example: "I initially opposed this approach, but after seeing the data, I realize it addresses customer needs better than my original idea."

Ineffective Example: "I keep changing my mind about everything. I don't know what I believe anymore."

The first shows learning agility; the second suggests fundamental uncertainty that may undermine leadership credibility.

4. Personal Context Vulnerability

Sharing relevant personal circumstances that affect work:

Effective Example: "I want to let you know I'm dealing with a family health situation. My commitment to our project remains strong, but I may need flexibility on meeting times this month."

Ineffective Example: Detailed sharing of personal medical or relationship issues without clear relevance to work context.

The first provides necessary context with appropriate boundaries; the second crosses into territory that may create discomfort or unclear expectations.

At the logistics company, I worked with a manager who struggled with vulnerability. He believed showing any uncertainty would undermine his authority. When inevitable problems arose, his team hesitated to bring issues forward, fearing his reaction. Through coaching, he learned to distinguish between undermining vulnerability ("I don't know what I'm doing") and constructive vulnerability ("I didn't consider that aspect—good catch. Let's adjust our approach."). As he incorporated appropriate vulnerability, his team's performance improved significantly through better problem identification and more creative solutions.

Finding Your Unique Management Voice

Beyond these general principles, authentic management requires developing your unique leadership voice—the distinctive way you express your values, perspective, and approach.

What Shapes Your Management Voice

Your authentic management voice emerges from several elements:

1. Your Core Values

The fundamental principles that drive your decisions and behavior:

- What non-negotiable standards do you maintain?
- What impact do you ultimately want to have?
- What would you stand for even when difficult?

2. Your Natural Strengths

The capabilities that come most naturally to you:

- When are you at your best as a leader?
- What do others consistently value in your approach?
- Where do you make distinctive contributions?

3. Your Personal History

The experiences that have shaped your perspective:

- What lessons have you learned through challenges?
- What unique background do you bring to your role?
- How have your past experiences informed your leadership?

4. Your Communication Style

Your natural modes of expression and connection:

- How do you most effectively convey ideas?
- What distinctive language or metaphors resonate with you?
- What communication approaches feel genuinely "you"?

Developing Your Authentic Voice

Finding your authentic management voice is an ongoing process of discovery and refinement:

1. Reflection and Self-Awareness

Regular examination of what feels authentic versus forced:

- Journal about moments when you felt most and least authentic
- Seek feedback about when you seem most engaged and natural
- Notice when you feel energized versus drained by different approaches

2. Experimentation and Feedback

Trying different approaches and learning from results:

- Experiment with expressing values more directly
- Try incorporating elements that feel authentic but you've hesitated to use
- Gather feedback about impact from trusted colleagues

3. Integration and Refinement

Synthesizing what works into your consistent approach:

- Identify patterns in what feels authentic and creates positive impact
- Refine approaches that are genuinely you but need adjustment in expression
- Develop comfort with your distinctive leadership signature

When I coached a senior leader at a financial services company, she struggled because she was trying to emulate a charismatic, visionary leadership style that felt inauthentic to her. Through reflection and experimentation, she discovered her authentic voice centered on thoughtful analysis, genuine listening, and measured decision-making. Once she embraced this authentic approach rather than trying to be someone else, both her effectiveness and her satisfaction increased dramatically.

Case Study: When to Share Your Pirate Doctor Videos

Let's return to my personal example of the YouTube channel I mentioned at the beginning of this chapter. For years, I kept my creative side separate from my professional identity, fearing judgment or reduced credibility.

So, why did I eventually decide to share them?

The Decision Process

My thought process followed a framework that can help with any authenticity decision:

1. Value Alignment Assessment

I reflected on how my creative work connected to my professional values:

- The videos demonstrated creativity, humor, and communication skills—all relevant to my work
- They showed a willingness to experiment and take reasonable risks
- They revealed a more complete picture of my capabilities and interests

2. Audience and Context Consideration

I thought carefully about different professional audiences:

- Coaching clients might actually benefit from seeing this dimension of me
- More traditional corporate contexts might require more explanation of relevance
- Some content was appropriate for all audiences; some might be shared more selectively

3. Intent Clarification

I examined my reasons for sharing or not sharing:

- Not sharing came from fear rather than thoughtful boundary-setting
- Sharing aligned with my value of authentic connection
- The intent was appropriate: to build more genuine relationships, not to promote unrelated content

4. Impact Analysis

I considered the likely consequences in different scenarios:

- Worst case: Some potential clients might find the content unprofessional
- Best case: It could attract clients who valued creativity and authenticity
- Most likely: It would strengthen connections with aligned clients while filtering out poor fits

The Integration Approach

Rather than an all-or-nothing decision, I took an integrated approach:

1. I acknowledged the creative work in appropriate professional contexts
2. I shared selectively based on relevance to specific relationships
3. I connected the creative work to relevant professional capabilities
4. I maintained appropriate boundaries around work that wasn't relevant

The result? As I gradually integrated more of my authentic self into my professional identity, I found that:

- Clients appreciated the fuller picture of who they were working with
- Relationships became more genuine and effective
- I attracted more clients who valued my actual strengths and approach
- My energy and satisfaction increased as I reduced compartmentalization

The key insight wasn't that everyone should share everything. It was that thoughtful integration of authentic elements creates more value than rigid separation driven by fear.

Navigating Organizational Cultures

The appropriate expression of authenticity varies significantly across organizational cultures. What works beautifully in one environment might create friction in another.

Assessing Cultural Context

When determining how to express your authentic self, consider these cultural dimensions:

1. Formality Spectrum

From highly formal to deliberately casual:

- How do people typically dress and speak?
- What level of hierarchy is evident in interactions?
- How are meetings and other work rituals structured?

2. Expressiveness Norms

From reserved to emotionally expressive:

- How openly do people share opinions and feelings?
- What range of emotional expression is typical?
- How is disagreement typically communicated?

3. Personal Disclosure Expectations

From strictly professional to personally integrated:

- How much do colleagues typically share about personal lives?
- Are family or outside interests regularly discussed?
- Do work and personal relationships commonly overlap?

4. Diversity of Expression

From conformity to celebration of difference:

- How much variety exists in communication styles?
- Is there a "type" that seems to succeed in the culture?
- How are outlier approaches received?

Strategies for Different Cultural Contexts

Different organizational cultures require different approaches to authentic self-expression:

In Highly Formal Cultures

- Find specific appropriate channels for personal expression
- Demonstrate value alignment through professional excellence
- Build relationships gradually with thoughtful personal disclosure
- Look for informal contexts that allow greater authenticity

I worked with a leader in a traditional financial institution who expressed her authentic creative thinking not through casual demeanor (which would have created resistance) but through thoughtfully designed workshops that gave innovative thinking a legitimate place within the formal culture.

In Control-Oriented Cultures

- Connect authentic expression to measurable business outcomes
- Introduce personal elements in the context of relevant skills or experiences
- Build credibility through results before expanding authentic expression
- Frame authenticity in terms of effectiveness rather than self-expression

At the logistics company, which had a strong control orientation, authentic leadership was best received when explicitly connected to business results. Leaders who first established performance credibility gained more latitude for authentic expression because it was seen as part of their effectiveness rather than a deviation from norms.

In Innovation-Focused Cultures

- Lead with your most creative authentic elements
- Connect personal passions to innovative thinking
- Use authentic perspective as a differentiated contribution
- Challenge constraints that limit authentic expression

I consulted with a technology startup where authentic expression of diverse perspectives was explicitly valued as a source of innovation. In this environment, conformity was actually seen as a limitation rather than a virtue, creating space for more immediate authentic expression.

In Relationship-Centered Cultures

- Begin with appropriate personal connection
- Share authentic elements that build relationship depth
- Use storytelling to connect personal experience to work context
- Recognize that authenticity is expected rather than optional

At a healthcare organization with a strong relationship culture, effective leaders naturally incorporated appropriate personal disclosure and authentic expression as part of relationship building. Those who maintained rigid professionalism without authentic elements were actually seen as less trustworthy and effective.

When Culture and Authenticity Conflict

Sometimes your authentic self fundamentally misaligns with organizational culture. When this happens, you have several options:

1. Find Subculture Fit

Look for teams or departments within the broader organization where different norms prevail:

- Innovation labs within traditional companies
- Customer-facing roles in otherwise internally focused organizations
- Special projects that operate under different expectations

2. Become a Cultural Contributor

Use your authentic difference as a positive contribution to the culture:

- Introduce new approaches with respect for existing culture
- Build coalition around the value of expanded expression
- Create space for others who may feel similarly constrained

3. Accept Limited Expression

Recognize that some environments simply cannot accommodate certain authentic expression:

- Determine which aspects of authenticity are most important to maintain
- Find appropriate external outlets for expression not suited to work context
- Assess whether the compromise is sustainable for your wellbeing

4. Plan Strategic Transition

If the misalignment is fundamental and significant, prepare for an eventual move:

- Build skills and relationships that support future opportunities
- Gather experiences that demonstrate your value beyond current context
- Research cultures that better align with your authentic approach

I worked with Boromir (not his real name, obviously), who faced this kind of fundamental misalignment. Despite attempts to find subcultures or create space for his

authentic approach, the organization consistently sidelined his ideas and increased demands without recognition. He ultimately recognized that his authentic leadership style—collaborative, innovation-focused, and built on mutual respect—simply wouldn't thrive in that command-and-control environment. He made a strategic transition to an organization where his authentic approach became a strength rather than a liability.

The Power of Deliberate Authenticity

What I've outlined so far might seem like a lot of analysis for something as fundamental as "being yourself." But truly effective authenticity in professional contexts isn't accidental—it's deliberate.

Deliberate authenticity means:

- Knowing yourself deeply enough to distinguish core values from surface preferences
- Understanding different contexts well enough to adapt expression appropriately
- Building relationships strong enough to withstand authentic disagreement
- Developing judgment refined enough to make thoughtful authenticity choices

The professionals who navigate this most effectively don't just "be themselves" without reflection. They develop what I call "authenticity intelligence"—the capacity to express their genuine selves in ways that build trust, create value, and maintain appropriate professional boundaries.

Principles of Deliberate Authenticity

These guidelines can help you make thoughtful choices about authentic expression:

1. Connect to Purpose

Frame authentic expression in terms of how it serves shared goals:

- How does this authentic aspect contribute to our collective work?
- Does this expression advance or distract from our purpose?
- Are my authentic contributions aligned with meaningful outcomes?

2. Consider Impact Before Expression

Reflect on likely effects before sharing:

- How might different audiences receive this authentic expression?
- What preparation or context might help others understand my authentic perspective?
- Is the timing appropriate for this expression?

3. Start with Listening

Build understanding before focusing on being understood:

- What matters to others in this context?
- How do they typically express their authentic perspectives?
- Where might my authentic expression resonate or create tension?

4. Expand Gradually

Build trust through progressive authentic sharing:

- Begin with authentic elements most relevant to immediate context
- Expand to broader authentic expression as relationships develop
- Match disclosure depth to relationship development stage

When I coached a technical leader transitioning to a customer-facing role, he worried that his authentic analytical style would clash with relationship expectations. Rather than either suppressing his authentic approach or ignoring context, he took a deliberate approach: He first listened deeply to customer concerns, then gradually introduced his analytical perspective in service of their goals. His authentic strength became valued precisely because he expressed it thoughtfully rather than indiscriminately.

Finding Your Authentic Integration Point

The ultimate goal isn't perfect authenticity in all situations—that's neither possible nor desirable. Rather, it's finding your optimal integration point between authenticity and appropriate professional expression.

This integration point varies based on:

1. Your Personal Authenticity Needs

Some people experience greater disconnection than others when adapting their self-expression:

- How important is external validation of your authentic self?
- Which aspects of authenticity most affect your wellbeing when constrained?
- What level of adaptation creates unsustainable internal tension?

2. Your Professional Context Demands

Different roles require different levels of alignment with established expectations:

- How much does your role involve formal representation?
- What stakeholder expectations significantly impact effectiveness?
- Which professional norms are fundamental versus flexible?

3. Your Influence Capacity

Your ability to expand acceptable expression varies with your position and relationships:

- What credibility have you established that creates latitude?
- How strong are your relationships with key stakeholders?
- What organizational influence do you have to shape expectations?

4. Your Growth Trajectory

Your optimal integration point evolves throughout your career:

- What authentic expression matters most at your current stage?
- How might your influence to shape context increase over time?
- What authentic development do you want to prioritize?

I found my own integration point evolving throughout my career. Early on, with limited influence and still developing capabilities, I expressed authenticity more selectively. As

I built credibility, relationships, and skill in communicating my authentic perspective effectively, I expanded authentic expression—not because I became more authentic, but because I developed greater capacity to express authenticity effectively in professional contexts.

Case Study: When to Share Your Pirate Doctor Videos

So, why share my silly YouTube videos after years of keeping them separate from my professional identity?

Practically, I think it's valuable for folks that might want to work with me to know this side of me. It gets across a big part of my sense of humor. And I hope people tell me it made them laugh.

More than that, the one-on-one coaching relationship is personal: yes, I'm here to help with the specific problem we're tackling, but ultimately I didn't get in the business of coaching for a sense of anonymity, for impersonal transactions at work.

And you didn't choose to work with me because you wanted a hyper-corporate coach. You chose me because you want to make work suck less™. And that starts with less self-censorship and more mash ups of Ted Talks and TikTok called TedToks.

I want to help you, and for you to see that I care. And part of that is me being vulnerable – I'll best be able to help you if you share what you're really coming up against, what you're honestly seeking, what you're struggling with. It requires a level of vulnerability.

So as a first step, I'm going to show my own vulnerability.

And yes, me showing vulnerability means videos where I pretend to be a pirate doctor.

This personal example illustrates several key principles:

- Connected to purpose: Sharing served the coaching relationship
- Gradual expansion: It followed established credibility and relationships
- Impact consideration: It was offered as an option, not imposed

- Authentic alignment: It expressed genuine aspects of my approach and personality

The outcome? Stronger client relationships, better coaching results, and yes, a few laughs. But most importantly, greater integration between my authentic self and professional work—reducing the energy drain that comes from maintaining separate identities.

Finding Your Unique Management Voice

Beyond these general principles of authenticity, truly effective managers develop a distinctive voice—a consistent expression of their values, perspective, and approach that becomes their leadership signature.

Elements of an Authentic Management Voice

Your management voice emerges from the integration of several elements:

1. Your Values Architecture

The hierarchy and relationship between what matters most to you:

- Which principles guide your decisions when values conflict?
- What patterns connect seemingly different priorities in your approach?
- How do your values translate into observable behaviors?

2. Your Communication Patterns

The distinctive ways you express ideas and engage with others:

- What metaphors or frameworks naturally resonate with you?
- How do you balance different communication modes (analysis, story, visuals, etc.)?
- What pacing and structure characterizes your natural expression?

3. Your Relationship Approach

How you build and maintain connections with others:

- What balance of supportive and challenging elements defines your relationships?
- How do you express care while maintaining appropriate boundaries?
- What distinctive contributions do you make to team dynamics?

4. Your Development Philosophy

Your approach to growth and improvement:

- How do you balance acceptance and aspiration?
- What learning methods do you naturally gravitate toward?
- How do you approach development conversations with others?

Developing Your Authentic Voice

Finding and refining your management voice is an ongoing process that includes:

1. Reflection on Peak Experiences

Examine moments when you felt most aligned and effective:

- What characterized situations where you thrived?
- When have others responded most positively to your approach?
- What patterns connect your most satisfying professional experiences?

2. Structured Feedback Collection

Gather insights about how others experience your authentic expression:

- What do colleagues experience as your distinctive strengths?
- How would they describe your approach compared to other managers?
- What consistent themes emerge in how others describe working with you?

3. Storytelling Practice

Develop comfort articulating your perspective through stories:

- What experiences shaped your management approach?
- How do you explain your values through concrete examples?

- What narratives help others understand your authentic perspective?

4. Deliberate Experimentation

Try different expressions of your authentic self:

- What authentic elements have you hesitated to incorporate?
- How might you express core values more explicitly?
- What new contexts might benefit from your authentic perspective?

I worked with a technical leader who struggled to find her authentic voice because she didn't match conventional leadership models. Through reflection and feedback, she discovered her distinctive strength lay in asking penetrating questions that helped teams identify underlying issues. Rather than trying to become more directive or visionary, she developed this authentic questioning approach into a powerful leadership voice that became her professional signature.

Conclusion: The Authentically Professional Manager

As we've explored throughout this chapter, authenticity and professionalism aren't opposing forces. At their best, they complement and strengthen each other, creating leadership that inspires trust, builds meaningful connection, and delivers sustainable results.

The authentically professional manager:

1. Brings their whole self to work—not indiscriminately, but thoughtfully
2. Adapts expression to context—not inauthentically, but appropriately
3. Shows appropriate vulnerability—not for its own sake, but in service of shared goals
4. Develops a distinctive voice—not to stand out, but to contribute uniquely
5. Builds genuine connections—not by erasing boundaries, but by honoring them

This integrated approach creates several powerful benefits:

- Reduced energy drain from maintaining separate identities
- Increased trust through consistent, values-based behavior

- Greater leadership impact through authentic connection
- Enhanced well-being through alignment between inner and outer expression
- More meaningful work through genuine engagement

As you continue your management journey, remember that authenticity isn't a fixed destination but an ongoing process of aligning your external expression with your internal reality while respecting the needs of professional contexts.

The goal isn't perfect authenticity—it's meaningful integration that allows you to lead with integrity, build genuine relationships, and create environments where others can do the same.

And sometimes, that means sharing your pirate doctor videos.

In the next chapter, we'll explore how structured reflection and planning tools can help you continue developing as a manager who makes work suck less—for yourself, your team, and your organization.

CHAPTER 13: Self-Reflection and Planning Tools

Annual Review Templates That Actually Help

A few years ago, Nick Halper and I started sharing our New Year plans with each other. He shared a template I've found really helpful, which I've adapted and used as a basis for my yearly check-ins since.

Most of us approach the new year with some vague intentions. Maybe we jot down a few resolutions, perhaps we set some goals. But all too often, these exercises feel hollow—divorced from our deeper values and disconnected from practical action. They become just another item on our to-do list, completed and then forgotten.

It doesn't have to be this way. With the right structure, annual reflection and planning can become a powerful engine for intentional growth and meaningful change.

The approach I recommend follows a straightforward but powerful structure:

1. Reflection: Values and Experiences
2. Vision: Statements and Vignettes
3. Action: Goals and Planning

This structure embodies how we should always approach goal setting: our values should inform our long-term vision, which informs our more immediate goals and plans; reflecting on the resulting experiences helps us better identify our values, creating a virtuous cycle.

In reality, it's never "that" easy—and that's okay. Any time we take to reflect on these things is time well spent (up to a point, of course; but who among us is spending too much time engaging with and delivering on New Year's plans?). Consider the time you dedicate to it a net gain, rather than time you "should have" spent on it as a net loss: as my therapist says, "shoulds are for shorses".

Step 1 - Reflection: Values and Experiences

The foundation of meaningful planning is understanding what matters to you and how your experiences have shaped you. This step includes reflection on several personal dimensions:

Values Exploration

What principles guide your decisions and define success for you?

Prompts:

- What beliefs do you hold that you would defend even when unpopular?
- What standards do you refuse to compromise, even when convenient?
- When have you felt most aligned with your deeper purpose?
- What common themes connect your most satisfying experiences?

Passions Inventory

What topics, activities, or challenges consistently energize you?

Prompts:

- What activities cause you to lose track of time?
- What subjects do you find yourself reading about or discussing voluntarily?
- What types of problems do you eagerly tackle even when difficult?
- What work feels like a contribution rather than an obligation?

Character Traits Assessment

What personal attributes consistently show up in how you operate?

Prompts:

- What qualities do others consistently see in you?
- What characteristics do you value in yourself?
- What traits emerge most strongly under pressure?
- How would close friends describe your distinctive strengths?

Roles Evaluation

How do you relate to others and what functions do you serve?

Prompts:

- What roles do you currently play professionally and personally?
- Which roles energize you and which deplete you?
- What responsibilities do you naturally gravitate toward?
- What roles would you like to grow into or move away from?

Rewarding Experiences Analysis

When have you felt most fulfilled and what patterns connect those experiences?

Prompts:

- What achievements are you most proud of from the past year?
- What moments gave you the greatest satisfaction?
- When did you feel most engaged and purposeful?
- What challenges provided the most meaningful growth?

This foundational reflection work may be the most challenging part of the process. Boiling down the intuitive ways we relate to experiences into single words or phrases can feel reductive. Do I value "security"? "Family"? "Growth"? The terminology can feel loaded with social baggage or inadequate to capture nuanced principles.

In juggling what terms to use and how to phrase things, know that the most useful approach will be an honest reflection of what surfaces for you. This reflection is for you. It is work you are doing to understand yourself better; and since you know what you mean by terms like "family" and "security," that is what matters.

(That being said, if digging into and questioning those values is how you want to use this exercise, that's also great!)

Step 2 - Vision: Statements and Vignettes

With greater clarity about your values and experiences, you can now develop a compelling vision for your future. This isn't about predicting your life with certainty, but rather creating a directional beacon that guides your decisions and actions.

End of Career Statement

This involves articulating how you hope your professional journey will conclude:

Process:

1. Draft a statement of how you see yourself wrapping up your "working years"
2. Identify the broad phases or milestones that would lead to that conclusion
3. Compare this draft vision against your values from Step 1
4. Refine the statement to create stronger alignment with your core values

Example: "By the end of my career, I will have helped hundreds of professionals find greater meaning and effectiveness in their work through coaching and organizational consulting. I'll have published work that continues to influence management practices after I've stepped back from active engagement. I'll transition gradually, mentoring a new generation of coaches while maintaining a small number of long-term client relationships that keep me connected to the field."

Future Self Vignettes

Narrative descriptions of your life ten years in the future provide concrete texture to your vision:

Process:

1. Write short scenes depicting specific days or moments in your future life
2. Include details about your work, relationships, environment, and activities
3. Focus on how you feel and what brings satisfaction in these scenarios
4. Ensure the vignettes reflect your values and desired experiences

Example Vignette: "It's Tuesday morning. I start the day with a walk through the neighborhood with my partner, discussing ideas for my upcoming workshop. After breakfast, I spend three hours coaching executives from diverse industries, each session conducted from my home office overlooking the garden. In the afternoon, I review the latest data from our coaching effectiveness study with my research collaborator. The evening includes dinner with friends who work in adjacent fields, where our conversation moves easily between professional ideas and personal stories."

Life's Work Statement

This captures the essence of what you hope to have accomplished through your professional efforts:

Process:

1. Reflect on the impact you want your work to have had
2. Consider both tangible outcomes and qualitative influences
3. Include both what you will have done and how you will have done it
4. Connect this to the legacy you wish to leave

Example: "My life's work will have been making work suck less for as many people as possible—not by offering temporary escapes or surface-level improvements, but by fundamentally changing how organizations and leaders operate. I will have influenced both individual leaders through direct coaching and broader systems through writing, teaching, and organizational consulting. My approach will have combined rigorous analysis with human empathy, practical tools with philosophical depth. I will be

remembered for helping people connect their authentic selves to meaningful work that serves others."

These vision elements aren't just fantasy exercises. By putting these projected realities into narrative form, we're adding detail to what the day-to-day we're building will look like. We're trying on possible futures for size. How do they feel? Do they fit?

Step 3 - Action: Goals and Planning

With reflection and vision in place, we can now develop concrete action plans that move us toward our desired future. This crucial step transforms aspirations into practical steps:

Annual Priorities Identification

Determine 4-6 major focus areas for the coming year:

Process:

1. Identify areas where progress would significantly advance your vision
2. Consider both professional and personal dimensions
3. Assess which priorities create foundation for other goals
4. Balance maintenance goals (sustaining what works) with growth goals (developing new capabilities)

Example Priorities:

- Expand coaching practice to include more executive clients
- Develop and test workshop curriculum on authentic leadership
- Build stronger professional network in healthcare sector
- Improve physical energy through consistent exercise and better sleep
- Deepen specific relationships that provide mutual support and growth

Vision Alignment Explanation

For each priority, articulate how it connects to your longer-term vision:

Process:

1. Explicitly connect each priority to specific elements of your vision
2. Identify how progress in this area builds necessary capabilities
3. Consider how this priority relates to your core values
4. Assess the timing—why this priority now versus later?

Example: "Expanding my executive coaching practice connects directly to my vision of influencing how organizations operate through their leaders. Working with more senior leaders will increase my impact scale while developing my capabilities to influence complex systems. This priority aligns with my values of meaningful contribution and continuous learning. With five years of coaching experience now established, I have the credibility and skills to move to this next level."

Strategy Development

For each priority, identify approaches to achieve progress:

Process:

1. Brainstorm multiple potential strategies for each priority
2. Assess the feasibility and effectiveness of each approach
3. Consider resource requirements (time, energy, money, relationships)
4. Select the most promising strategies for implementation

Example Strategies (for expanding executive coaching practice):

- Develop relationships with HR leaders in target organizations
- Create compelling case studies from existing client successes
- Refine service offerings specifically for executive challenges
- Build referral systems with trusted professional connections
- Establish stronger online presence focused on executive concerns

Concrete Action Steps

Break strategies into specific, actionable steps:

Process:

1. Identify the first 3-5 concrete actions for each strategy

2. Make steps specific, measurable, and time-bound
3. Consider dependencies and sequencing
4. Schedule initial steps directly into your calendar

Example Actions (for developing relationships with HR leaders):

- Research and create list of 20 target organizations by January 15
- Attend HR leadership conference in March and aim for 10 meaningful conversations
- Schedule monthly coffee meetings with HR contacts in my existing network
- Develop brief, valuable resource specifically for HR leaders by February 28
- Create tracking system for relationship development by January 10

This structured approach to action planning creates clear pathways between your current reality and desired future. The explicit connection to your vision and values ensures that your efforts align with what truly matters to you rather than responding to external pressures or temporary impulses.

Implementation: Moving from Plan to Reality

Having a well-structured plan is only the beginning. Effective implementation requires additional elements:

1. System Creation

Develop supporting structures that maintain momentum:

- Calendar integration: Schedule time blocks for priority work
- Review mechanisms: Establish regular check-ins on progress
- Accountability structures: Create external commitments that motivate follow-through
- Environment design: Arrange physical and digital spaces to support your priorities

2. Obstacle Anticipation

Proactively identify and address potential barriers:

- Historical patterns: Review past attempts at similar goals—what derailed them?
- Resource constraints: What limitations might impact implementation?
- Competing priorities: What existing commitments might conflict?
- Internal resistance: What personal habits or beliefs might interfere?

3. Resilience Planning

Prepare for inevitable disruptions and setbacks:

- Minimum viable actions: Identify the smallest meaningful steps for low-energy periods
- Re-engagement strategies: Plan how to restart after interruptions
- Support networks: Determine who can help during difficult periods
- Reassessment triggers: Establish when to review and potentially adjust goals

4. Progress Tracking

Create simple but effective ways to monitor advancement:

- Visual indicators: Dashboards or charts that show movement
- Milestone celebrations: Planned acknowledgment of key achievements
- Learning documentation: Records of insights gained through implementation
- Periodic reviews: Scheduled comprehensive assessment of progress

I want to be clear on one ingredient that is so critical here: self-compassion.

We will all fall off the wagon at some point this year—no one goes from 1/1 to 12/31 without a single cheat day. Except maybe Ryan Gosling (note: if at some point after publishing we find Ryan Gosling is, in fact, flawed, please note this was written in a state of blissful ignorance).

But when you do fall, nothing will guarantee you stay off the wagon more than shame, guilt, and self-flagellation. The Middle Ages had enough corporeal punishment for all of us! No need to add metaphorical corporeal punishment to the pile.

Last tip: make the goals realistic and the routine actions doable. Hairy, audacious goals are overrated. I like getting my gold star, and I'm not afraid to say it.

Last, last tip: having a regular reminder of your goals helps maintain inspiration. This can be a recurring review of progress, a printout of your vision statement, or magic marker on the shower tiles writing out your goals for the year. Anything to spark a bit of motivation when the weather's bad!

A Festivus Approach to New Years

First grade, January. Construction paper, tape, and too many crayons. Dennis the Menace on the brain. A dream: be the funniest kid in class. "What's your new year's resolution, Peter?"

"To beat the elite four in Pokemon"

Even making a New Year's Resolution funny was a challenge. Fast-forward 20 years and the baggage of self improvement and "success" weighs down most of the potential good such an exercise can bring. New Year's Resolutions are often co-opted by corporations and leave us less motivated than before. Can introspection in the darkest time of year even yield anything?

Also, to explain the Festivus reference: the common refrain is "a Festivus for the rest of us" in Seinfeld. This is a New Years plan for the rest of us.

The approach I've outlined above isn't about perfect execution or massive transformation. It's about thoughtful engagement with your own development. A New Years for the rest of us—not for the ultra-disciplined productivity gurus or the naturally gifted goal-achievers.

Here's what makes this approach more accessible and sustainable:

1. Values-Based Rather Than Comparison-Driven

Starting with personal values and experiences rather than externally defined "shoulds":

- What matters to you, not what impresses others
- Growth that feels meaningful, not metrics that look impressive
- Direction guided by purpose, not competition with others

2. Narrative-Focused Rather Than Solely Metric-Driven

Using stories and vignettes to bring possible futures to life:

- Engagement with how life might feel, not just what you might achieve
- Connection to personal meaning, not just observable outcomes
- Motivation through purpose, not just through measurement

a. Integrated Rather Than Compartmentalized

Considering personal and professional dimensions as interconnected:

- How various life aspects support or strain each other
- Where values manifest across different contexts
- How resources (time, energy, attention) flow between priorities

4. Process-Oriented Rather Than Outcome-Fixated

Focusing on approaches and systems, not just end results:

- Learning and adjustment throughout the year
- Value in the journey, not just the destination
- Growth through attempts, not just through achievements

This "Festivus" approach acknowledges the reality of being human in a complex world. It embraces imperfection while still creating meaningful direction. It's about progress, not perfection—momentum, not flawlessness.

Vision Statements That Inspire Action

I've found that the most effective vision statements share specific qualities that bridge inspiration and practicality. These aren't just pretty words—they're functional tools that guide decision-making and motivate consistent action.

Characteristics of Effective Vision Statements

1. Personally Meaningful

Connected to your authentic values and aspirations:

- Uses language that resonates emotionally for you
- Reflects your unique perspective and priorities
- Feels genuinely desirable when you imagine it
- Creates a sense of purpose beyond external validation

2. Concrete Yet Flexible

Specific enough to guide action while allowing for adaptation:

- Includes tangible elements you can envision
- Avoids rigid prescriptions that don't accommodate change
- Focuses on essential outcomes rather than exact methods
- Creates direction without requiring a single fixed path

3. Balanced in Scope

Neither so narrow it limits possibility nor so broad it provides no guidance:

- Includes professional and personal dimensions
- Spans appropriate time horizons (near, mid, and long-term)
- Considers both achievement and experience
- Addresses what you'll do and who you'll become

4. Inherently Motivating

Energizes rather than depletes you when you engage with it:

- Connects to intrinsic motivations rather than external pressures
- Balances aspiration with authenticity
- Creates pull toward the future rather than push from dissatisfaction
- Remains compelling even when implementation becomes challenging

Vision Statement Templates

Different formats work for different people. Here are several effective approaches:

The Legacy Format

Focuses on long-term impact and contribution:

"By the end of my career, I will have [key contributions] through [primary methods]. My work will have influenced [specific beneficiaries] by [forms of impact]. I will be remembered for [distinctive qualities and approaches]."

The Day-in-the-Life Format

Creates vivid pictures of desired daily experience:

"It's [typical day] in [future year]. I begin my day with [morning routine]. My work includes [key activities] with [important relationships]. I spend my time [allocation across priorities]. The environment around me includes [key elements]. At the end of the day, I feel [desired emotions and states]."

The Evolution Format

Maps growth and development over time:

"Within 3 years, I will have developed [near-term capabilities] and established [key foundations]. By 5-7 years, these will have evolved into [mid-term achievements and roles]. Eventually, this path leads toward [long-term vision elements]. Throughout this journey, I remain committed to [enduring values and priorities]."

The Impact-Centered Format

Organizes vision around different spheres of influence:

"My professional impact includes [work contributions and achievements]. My community impact involves [local and broader influences]. My relationship impact encompasses [how key relationships flourish]. My personal development manifests through [growth and wellbeing elements]."

The most important quality isn't which template you choose, but whether it helps you articulate a future that genuinely inspires you and provides practical guidance for decisions and actions.

Aligning Your Values with Your Work

The reflection process often reveals gaps between what truly matters to you and how you currently spend your time and energy. Addressing these misalignments creates both greater fulfillment and more sustainable performance.

Identifying Alignment Gaps

Several common patterns of misalignment emerge from reflection:

1. Value Expression Gaps

Your core values aren't adequately reflected in your work:

- What values feel underexpressed in your current role?
- Which organizational priorities conflict with personal values?
- Where do you feel pressure to compromise on principles?
- What value-aligned activities get crowded out by other demands?

2. Capability Utilization Gaps

Your distinctive strengths aren't fully engaged:

- Which capabilities do you value that remain untapped?
- What percentage of your time goes to work that leverages your best skills?
- Where are you operating below your capability level?
- What growth opportunities align with your natural strengths?

3. Impact Satisfaction Gaps

The outcomes of your work don't create desired fulfillment:

- Does your work impact causes and communities you care about?
- Can you see a clear connection between your efforts and meaningful results?
- Do performance metrics align with what you believe truly matters?
- Is your influence directed toward changes you genuinely value?

4. Experience Quality Gaps

Your day-to-day experience doesn't provide desired qualities:

- What emotional states do you value that your work rarely creates?
- Which relationship qualities matter to you but are missing?
- What environmental elements would support greater wellbeing?
- How does your current pace and intensity align with sustainable thriving?

Strategies for Greater Alignment

Once you've identified misalignments, several approaches can help bridge the gaps:

1. Role Crafting

Reshaping your current role to better align with values:

- Emphasize tasks and projects that connect to core values
- Negotiate for more time on high-alignment responsibilities
- Build explicit connection between required work and personal values
- Create meaning through how you approach even neutral tasks

2. Contribution Expansion

Finding additional outlets for value expression:

- Volunteer for initiatives that align with underexpressed values
- Create side projects that activate meaningful capabilities
- Mentor others in areas you find purposeful
- Participate in organizational culture-building aligned with your values

3. Boundary Setting

Protecting space for what matters most:

- Establish clear limits around low-alignment activities
- Create dedicated time for high-value work
- Develop scripts for declining misaligned requests
- Set expectations about availability and response times

4. Transition Planning

Preparing for more substantial realignment:

- Identify roles or organizations with better value alignment
- Develop capabilities needed for high-alignment opportunities
- Build relationships in domains of greater meaning
- Create financial runway for potential transitions

One client I worked with discovered through reflection that creativity and mentorship were core values that felt significantly underexpressed in her operations management role. Rather than immediately seeking a new position, she started by identifying creative approaches to process improvement and volunteering to mentor junior team members. These incremental changes significantly increased her engagement while she developed capabilities for a longer-term transition to a role with even greater alignment.

The Festivus Approach in Practice

Let me share how this approach played out for me during a significant transition period, both to illustrate the process and to demonstrate its adaptability to different circumstances.

Context: Career Transition Phase

Several years ago, I found myself at an inflection point. I had built significant experience in both operational leadership and technical account management, but felt increasing pull toward work that more directly helped individuals develop and thrive. My reflection process revealed several key insights:

Values Clarification

My reflection highlighted three core values that needed stronger expression:

- Impact on individual wellbeing: Making tangible difference in people's daily experience
- Authentic connection: Building relationships based on genuine understanding
- Continuous learning: Constantly developing new insights and approaches

Experience Patterns

Review of peak experiences revealed consistent themes:

- Most energizing moments involved helping others navigate challenges
- Greatest satisfaction came from seeing people overcome limiting beliefs
- Strongest engagement occurred in one-on-one or small group contexts
- Learning and teaching cycles created sustainable energy

Capability Inventory

Assessment of strengths and interests showed:

- Strong pattern recognition across different situations
- Natural tendency to see systems and interconnections
- Ability to translate complex concepts into practical approaches
- Comfort with ambiguity and emergent solutions

Vision Development

Based on these reflections, I developed vision elements that eventually led to my coaching practice:

End of Career Statement

"By the end of my professional journey, I will have helped thousands of people experience more meaningful, effective, and sustainable work lives. My approach will have combined practical tools with deeper insights about human motivation and organizational dynamics. I'll have built a body of work—through coaching, writing, and teaching—that continues to influence how people approach work long after my direct involvement."

"It's Wednesday morning. I start with a walk while listening to a podcast on organizational psychology, making notes about ideas to explore with clients. My morning includes three coaching sessions with leaders facing different challenges—one navigating a difficult team transition, another developing a more authentic leadership voice, and a third balancing competing organizational priorities.

Between sessions, I work on content for an upcoming workshop, translating complex concepts into practical exercises. Late afternoon includes a virtual coffee with another

coach to exchange perspectives on a challenging client situation. The day ends with reading and reflection, connecting new ideas to patterns I've observed across client experiences. Throughout the day, I feel energized by meaningful connection, challenged by complex human dynamics, and satisfied by tangible impact on people's work lives."

Life's Work Statement

"My life's work is helping people experience work as a source of meaning and growth rather than merely obligation or stress. I approach this work with genuine curiosity about each person's unique context, practical tools based on both research and experience, and deep commitment to creating sustainable change rather than quick fixes. My contribution lies in bridging psychological insight with organizational realities, combining analytical understanding with authentic human connection."

Priority and Action Development

With this vision in place, I established priorities and actions for the transition year:

Annual Priorities

1. Build coaching capabilities and credibility
2. Develop professional network in coaching/development space
3. Create initial service offerings and materials
4. Establish sustainable business foundations
5. Maintain financial stability during transition

Sample Strategy (for building coaching capabilities)

- Complete recognized coaching certification program
- Develop specialized knowledge in organizational dynamics
- Conduct pro bono coaching to build experience
- Create structured reflection process for continuous improvement
- Establish regular supervision with experienced coach mentor

Sample Action Steps (for coaching certification)

- Research and evaluate certification programs by February 15

- Apply to selected program by March 1
- Complete required pre-work by program start date
- Schedule protected time blocks for certification requirements
- Create learning journal for ongoing integration of concepts

Implementation Results

While the implementation wasn't flawless, this structured approach created several important outcomes:

1. Clearer decision-making when opportunities arose
2. Maintained momentum through inevitable obstacles
3. Greater resilience during challenging periods
4. More coherent development compared to previous transitions
5. Deeper satisfaction from alignment with core values

Most importantly, the process created not just a new career but a more integrated professional identity where my work and values reinforce rather than compete with each other.

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The New Years Template

Let's bring together everything we've discussed into a practical template you can use for your own annual reflection and planning process:

PART 1: REFLECTION

Personal Values

- List 5-7 core values that guide your decisions and define success for you
- For each value, write a brief description of what it means specifically to you
- Identify how each value currently manifests (or doesn't) in your work life

Strengths and Capabilities

- List your most distinctive and energizing capabilities
- Note which capabilities feel most developed and which need further growth
- Identify which capabilities are most and least utilized in your current work

Roles and Relationships

- Map your current professional and personal roles
- Rate each role for energy creation versus depletion
- Identify relationship qualities that enhance or diminish your effectiveness

Meaningful Experiences

- Describe 3-5 peak experiences from the past year
- Analyze patterns that connect these fulfilling moments
- Identify conditions that enabled these positive experiences

Learning and Growth

- Reflect on your most significant learnings from the past year
- Consider both successes and challenges as sources of insight
- Identify areas where growth feels most needed or desired

PART 2: VISION

Ten-Year Vision

- Write a narrative description of your professional life ten years from now
- Include work content, relationships, environment, and impact
- Ensure alignment with the values identified in Part 1

Professional Purpose Statement

- Craft a concise statement of the impact you want your work to have
- Include both what you'll contribute and how you'll contribute it
- Connect to the values and capabilities identified earlier

Future Self Description

- Write a "day in the life" vignette set 3-5 years in the future
- Include specific details about activities, relationships, and feelings
- Create a vision that feels both aspirational and authentically possible

PART 3: PRIORITIES AND ACTION

Annual Priorities

- Identify 4-6 key priority areas for the coming year
- For each priority, explain how it connects to your longer-term vision
- Rate each priority for both importance and urgency

Strategies and Approaches

- For each priority, develop 2-3 potential strategies for progress
- Assess the resources required for each strategy
- Select the most viable approaches based on current context

Concrete Actions

- Break each strategy into 3-5 specific action steps
- Make each action specific, measurable, and time-bound
- Identify which actions to begin in the next 30 days

Support and Accountability

- Determine what resources you need for implementation
- Identify potential obstacles and mitigation approaches
- Create accountability mechanisms for key commitments

PART 4: INTEGRATION

Calendar Integration

- Schedule dedicated time blocks for priority work
- Create regular review points throughout the year
- Protect time for reflection and adjustment

Environment Design

- Identify changes needed to physical workspace
- Develop digital environment supports (apps, reminders, etc.)
- Create visual representation of key goals and principles

Relationship Supports

- Determine who can provide support for different priorities
- Plan specific conversations to engage support
- Create accountability partnerships where appropriate

Implementation Practices

- Establish daily and weekly routines that support priorities
- Develop specific resilience practices for challenging periods
- Create celebration rituals for meaningful progress

Personal Growth through Self-Reflection

The planning process I've outlined is ultimately a tool for personal growth, not just achievement. The most valuable outcomes often emerge from how the process changes your self-understanding and approach to life, not just the specific goals you accomplish.

The Reflection Mindset

Effective self-reflection requires specific mental qualities:

1. Compassionate Curiosity

Approaching yourself with genuine interest rather than judgment:

- Noticing patterns without immediate criticism
- Asking "what's happening here?" before "how do I fix this?"
- Viewing challenges as information rather than failures
- Treating yourself with the same kindness you'd offer others

2. Balanced Perspective

Seeing both strengths and growth areas clearly:

- Acknowledging accomplishments without inflation or dismissal
- Recognizing limitations without harsh self-criticism
- Appreciating progress while acknowledging further potential
- Holding both acceptance of current reality and aspiration for growth

3. Systems Thinking

Understanding yourself as an integrated system within larger systems:

- Noticing connections between different life dimensions
- Recognizing how context shapes your experiences and choices
- Identifying leverage points for meaningful change
- Appreciating how change in one area affects other areas

4. Learning Orientation

Viewing experiences primarily as opportunities for growth:

- Finding valuable lessons in both successes and disappointments
- Seeking understanding before seeking solutions
- Approaching change with curiosity rather than anxiety
- Valuing ongoing development over fixed end states

Regular Reflection Practices

Annual planning works best when supported by ongoing reflection practices:

Daily Reflection

Brief end-of-day review focused on learning and adjustment:

- What energized me today? What depleted me?
- What progress did I make toward important priorities?
- What did I learn that might inform tomorrow?
- Where might I need to adjust my approach?

Weekly Review

More substantial assessment of patterns and progress:

- How aligned were my activities with my priorities?
- What patterns am I noticing in my energy and effectiveness?
- What adjustments would better support my goals?
- What specific commitments do I want to make for next week?

Monthly Deeper Dive

Extended reflection on larger patterns and directions:

- How am I progressing on my key priorities?
- What's working well that I should continue or expand?
- What's not working that needs significant adjustment?
- What's emerging that wasn't visible when I made my plans?

Quarterly Reset

Substantial reassessment and course correction:

- What significant progress have I made toward annual goals?
- What major obstacles or opportunities have emerged?
- How have my priorities or values evolved since planning?
- What adjustments to goals or strategies are needed?

These ongoing practices prevent the "plan once, forget immediately" pattern that undermines many annual planning efforts. They create a continuous learning loop that allows both persistence toward important goals and appropriate adaptation to changing circumstances.

Conclusion: Tools for Continuous Growth

The reflection and planning approaches I've shared aren't just annual exercises—they're tools for continuous growth throughout your management journey. They help you develop not just better plans, but a better relationship with planning itself—one based on learning and adaptation rather than rigid prediction and control.

The most effective managers I've worked with don't just use these tools periodically. They develop a reflective orientation to their entire professional life, consistently asking:

- What matters most here and why?
- What am I learning from this experience?
- How does this connect to my broader purpose and values?
- What adjustment would create better alignment?

This reflective orientation doesn't replace action—it enhances it. By creating regular space to reconnect with what matters, assess what's working, and adjust approaches thoughtfully, you build the foundation for more meaningful impact and sustainable performance.

In the final chapter, we'll explore how to recover from inevitable management mistakes, learning from failures without being defined by them.

CHAPTER 14: Recovering from Management Mistakes

When You've Been Sauron (and How to Fix It)

The wrath of Sauron took Frodo for a ride. Frodo had installed Slack on the One Ring and it was buzzing off the chain. Message after message tore into Frodo and the quality of his work.

Sauron took issue with Frodo's handling of Smeagol: he wanted Frodo to send Smeagol away and continue his journey without him.

Frodo showed kindness and pity to Smeagol. Others, even Frodo's dear friend Sam, showed him contempt. But early in his travels, Frodo got the advice from his mentor Gandalf that Smeagol had a role yet to play in the events to come. Frodo took this insight with him throughout his adventures, making sure not to burn bridges with the creepy, crawly creature.

Sauron derided Frodo's kindness, listing each opportunity that Frodo had where he could have rid himself of Gollum (Sauron's preferred nickname for poor Smeagol). But this was the first time Sauron mentioned Gollum explicitly to Frodo. Sauron did not make clear what he needed of Frodo. To be charitable, at best Sauron was reacting poorly to disappointment that Frodo did not meet his uncommunicated expectations.

And then there's the irony of Sauron's misplaced anger: in a trippy, Terminator-time-travel style line of reasoning, some speculate that Frodo actually chose to destroy the ring just to stop the angry Slack messages from Sauron. In a very real sense, Sauron shot himself in the foot (or threw himself in the volcano) by letting loose such an unprofessional reaction on Frodo.

We've all had Sauron moments as managers—times when our emotions overrode our judgment, when we provided feedback that was more heat than light, or when we failed to communicate expectations clearly before expressing disappointment about unmet ones. While hopefully none of us have sent a barrage of angry messages through jewelry-based Slack installations, we've all made management mistakes that damaged trust, undermined performance, or created unnecessary suffering.

In this final chapter, we'll explore how to recover from these inevitable management missteps. Because the truth is, even the best managers mess up. The difference between great managers and merely good ones isn't the absence of mistakes—it's how they respond when they happen.

The Common Types of Management Mistakes

Before we discuss recovery, let's acknowledge some common categories of management errors:

1. Emotional Reactivity

Letting your emotions drive your interactions in ways that damage trust:

- Expressing frustration or anger inappropriately
- Allowing disappointment to manifest as personal criticism
- Making decisions from an emotionally triggered state
- Using tone or language that creates fear rather than focus

2. Expectation Failures

Not establishing or communicating expectations effectively:

- Assuming others share your unspoken expectations
- Providing unclear guidance that creates confusion
- Changing expectations without appropriate communication
- Holding people accountable for standards never clearly established

3. Feedback Failures

Delivering feedback in ways that prevent growth:

- Avoiding necessary feedback until issues compound
- Providing feedback too general to be actionable
- Focusing exclusively on shortcomings without acknowledging strengths
- Framing feedback as character indictments rather than behavior observations

4. Development Neglect

Failing to support others' growth and capability building:

- Prioritizing immediate results over long-term development
- Missing opportunities to provide growth challenges
- Hoarding knowledge or failing to share context

- Overlooking individual learning needs and styles

5. Relationship Damage

Actions that undermine trust and psychological safety:

- Breaking confidentiality or sharing inappropriate information
- Taking credit for others' work or failing to acknowledge contributions
- Making promises you don't keep or can't fulfill
- Speaking about team members differently to different audiences

6. Structural Failures

Creating systems and processes that set people up for failure:

- Establishing unrealistic deadlines or resource constraints
- Designing unclear decision-making processes
- Creating conflicting priorities without guidance for resolution
- Allowing power dynamics to go unacknowledged and unaddressed

When Sauron unleashed his wrath on Frodo, he combined several of these error types: he reacted emotionally, failed to establish clear expectations beforehand, delivered feedback that attacked rather than developed, and damaged what relationship existed between them. It was, as they say in management literature, a total mess.

Learning from Failure Without Dwelling on It

When you realize you've made a management mistake, the path to recovery involves several key elements:

1. Recognition and Ownership

The recovery process begins with honest acknowledgment:

Self-Awareness Development

Training yourself to notice mistakes sooner:

- Regular reflection on interactions and outcomes
- Attention to others' responses to your actions
- Noticing your own emotional states and triggers
- Seeking feedback about your impact on others

Clean Acknowledgment

Taking appropriate responsibility without defensiveness:

- Identifying specific behaviors and their impacts
- Avoiding qualification or justification
- Distinguishing between intent and actual effect
- Taking ownership of your contribution to the situation

As a new manager at the logistics company, I once gave harsh feedback to a team member in a public setting. It took me several days to fully recognize how inappropriate this was, but when I did, my first step was simply acknowledging to myself: "I handled that poorly. Regardless of my frustration about the mistake, delivering feedback that way was unprofessional and potentially humiliating."

2. Repair and Restoration

Once you've recognized the mistake, direct action is needed to address the damage:

Appropriate Apology

Offering a genuine apology when warranted:

- Naming the specific behavior clearly
- Acknowledging the impact without minimizing it
- Avoiding excuses while providing brief context if relevant
- Expressing genuine regret focused on impact, not just your feelings about it

Restored Expectations

Clarifying the path forward:

- Resetting expectations clearly and specifically

- Creating appropriate space for questions and discussion
- Distinguishing between what's changing and what remains the same
- Acknowledging any uncertainty while providing available clarity

Relationship Investment

Rebuilding damaged trust through consistent action:

- Following through on commitments made during repair
- Demonstrating changed behavior rather than just promising it
- Creating appropriate positive interactions to balance negative experiences
- Respecting boundaries while working to restore connection

After my public feedback mistake, I scheduled a private conversation with the team member. I apologized specifically for giving critical feedback in front of colleagues, acknowledged the embarrassment this likely caused, and committed to handling all future feedback in private. I also clarified that while the performance issue still needed addressing, we would discuss it constructively in our one-on-one meeting the following day.

3. Learning and Adaptation

Effective recovery goes beyond repair to prevent similar mistakes in the future:

Root Cause Analysis

Identifying the underlying factors that contributed to the mistake:

- Personal triggers that affected your judgment
- System conditions that created pressure or confusion
- Knowledge or skill gaps that limited your effectiveness
- Assumptions that proved incorrect or incomplete

Prevention Strategy Development

Creating approaches to avoid similar mistakes:

- Personal practices that build desired capabilities

- Environmental modifications that support better choices
- Decision frameworks that improve judgment in similar situations
- Support systems that provide guidance when needed

Integration into Development Plan

Connecting the learning to your broader growth as a manager:

- Adding specific development goals based on the insight
- Seeking resources or relationships that support needed growth
- Creating accountability for implementing prevention strategies
- Scheduling review points to assess progress

Reflecting on my public feedback error, I realized several contributing factors: I was still transitioning from individual contributor to manager role, I hadn't established clear feedback norms for myself, and I was reacting to pressure from my own manager about team performance. I developed a personal feedback protocol with specific guidelines for different situations, sought mentoring from a more experienced manager, and scheduled monthly reflection on how I was handling difficult conversations.

4. Perspective Maintenance

Recovery requires balancing responsibility with self-compassion:

Appropriate Self-Compassion

Treating yourself with the same kindness you would offer others:

- Recognizing the universality of management mistakes
- Distinguishing between taking responsibility and harsh self-judgment
- Applying the same standards to yourself that you would to a colleague
- Focusing on growth rather than rumination

Proportional Response

Keeping mistakes in appropriate perspective:

- Assessing the actual versus imagined impact

- Distinguishing between major breaches and minor missteps
- Recognizing when you're catastrophizing outcomes
- Balancing acknowledgment with forward movement

Recovery Modeling

Demonstrating healthy error recovery for your team:

- Showing that mistakes don't define professional worth
- Demonstrating how to own errors without shame
- Illustrating growth mindset through your own learning
- Creating permission for others to acknowledge and learn from mistakes

After addressing my feedback mistake, I noticed myself continuing to mentally replay and criticize my actions days later. I realized I was holding myself to an unrealistic standard of perfection as a new manager. I asked myself how I would respond to a team member who made a similar error and then committed to showing myself the same balance of accountability and understanding. Later, when appropriate, I briefly shared with the team what I had learned about effective feedback approaches—modeling how to learn from mistakes without excessive self-criticism.

When Others Have Been Sauron to You

Sometimes you're not Sauron—you're Frodo, on the receiving end of someone else's management mistake. Whether it's your own manager, a peer, or someone else in your organization, how you respond to others' errors significantly impacts both your wellbeing and the overall work environment.

Responding to Others' Management Mistakes

Effective responses balance self-protection with relationship preservation:

1. Emotional Processing

Managing your own reaction before responding:

- Recognizing your emotional response without immediate action

- Distinguishing between the objective situation and your interpretation
- Considering possible explanations beyond the most negative
- Determining what you need for appropriate resolution

2. Boundary Setting

Protecting yourself while maintaining professional engagement:

- Naming inappropriate behavior clearly and specifically
- Stating impact rather than attributing intentions
- Expressing what you need going forward
- Following through on stated boundaries consistently

3. Resolution Seeking

Working toward constructive outcomes when appropriate:

- Requesting specific conversations to address concerns
- Leading with curiosity about context and constraints
- Focusing on future patterns rather than past instances
- Looking for mutual interest beneath conflicting positions

4. Development Opportunity

Using the experience as a growth catalyst:

- Identifying what the situation reveals about your own triggers
- Considering what skills might help navigate similar situations
- Reflecting on how this informs your own management approach
- Extracting learning even from negative experiences

When I worked at Affirm, a senior leader once criticized my team's work in a large meeting without having reviewed the actual deliverables or understanding our constraints. Rather than responding defensively in the moment, I requested a private follow-up conversation. In that meeting, I acknowledged the importance of the concerns raised while providing context about our work that hadn't been considered. We established a new communication protocol to prevent similar situations, and I

learned valuable lessons about stakeholder management that improved my own leadership approach.

Supporting Team Recovery from Management Mistakes

As a manager, you may also need to help your team recover when they've been impacted by management errors—whether yours or those of others in the organization:

1. Appropriate Acknowledgment

Creating space for legitimate concerns:

- Validating reasonable reactions without amplifying drama
- Distinguishing between venting and problem-solving
- Acknowledging systemic issues without undermining leadership
- Creating appropriate transparency about addressing concerns

2. Focus Restoration

Helping the team regain productive momentum:

- Clarifying current priorities and expectations
- Reinforcing team purpose and meaningful impact
- Addressing practical implications of any changes
- Creating appropriate closure to move forward

3. Learning Integration

Extracting value from challenging experiences:

- Identifying team-level lessons and adjustments
- Discussing how to navigate similar situations in the future
- Reinforcing resilience and adaptability as team strengths
- Finding opportunity within disruption

4. Pattern Prevention

Working to address recurring management issues:

- Identifying any systemic contributors to the problem
- Advocating appropriately for needed changes
- Creating buffers against predictable challenges
- Building team capability to navigate organizational realities

When my team at the logistics company was demoralized after an organizational restructuring was handled poorly by senior leadership, I created space in our team meeting to acknowledge the frustration while refocusing on aspects within our control. We identified specific workflow adjustments needed due to the changes, discussed how to maintain service quality during the transition, and even found potential opportunities in the new structure. While not dismissing legitimate concerns, this balanced approach helped the team regain momentum and resilience.

The Courage to Change Course

Sometimes the most significant management mistake isn't a single action but a sustained direction that needs correction. The willingness to acknowledge when your approach isn't working—and the courage to change course—represents one of the most challenging and important recovery skills.

Recognizing the Need for Direction Change

Several signals may indicate that a substantial shift is needed:

1. Persistent Negative Patterns

Recurring issues despite attempted solutions:

- Similar conflicts arising repeatedly
- Consistent underperformance despite interventions
- Ongoing confusion or misalignment
- Repeated feedback with minimal improvement

2. Diminishing Results

Declining outcomes despite increased effort:

- Decreasing team performance metrics
- Waning engagement and enthusiasm
- Growing resistance to initiatives
- Increasing effort required for diminishing returns

3. Personal Warning Signs

Internal indicators of misalignment:

- Chronic frustration or dissatisfaction
- Escalating stress without corresponding meaning
- Declining confidence in your approach
- Growing disconnect between stated values and actual methods

4. External Feedback

Input from trusted sources suggesting reconsideration:

- Consistent theme in feedback from multiple stakeholders
- Direct input from mentors or coaches
- Patterns in team member departures or disengagement
- Organizational metrics indicating concerning trends

At EasyPost, I initially structured the support team around individual ownership of customer accounts, believing this would create stronger relationships and accountability. After several months, despite numerous adjustments, we continued to see coverage gaps, knowledge silos, and burnout signals. Performance metrics were stagnant despite increasing effort, and team members were expressing frustration with the model. Although I had invested significantly in the approach, these consistent signals indicated a need for fundamental reconsideration.

Implementing Significant Direction Changes

When you determine that substantial course correction is needed, these approaches can help:

1. Transparent Assessment

Honest evaluation of the current approach:

- Gathering relevant data about outcomes and impacts
- Soliciting input from those affected by the approach
- Assessing alignment with broader objectives and values
- Identifying specific aspects that aren't serving intended purposes

2. Collaborative Redesign

Engaging appropriate stakeholders in developing alternatives:

- Creating space for diverse perspectives on potential changes
- Building on what's working while addressing what isn't
- Considering implications across different stakeholders
- Testing assumptions about how new approaches would function

3. Thoughtful Communication

Articulating the change in ways that build understanding and support:

- Explaining the rationale for adjustment clearly
- Acknowledging both the value and limitations of the previous approach
- Connecting the new direction to shared goals and priorities
- Addressing concerns and questions transparently

4. Supported Transition

Providing resources and guidance during implementation:

- Creating clear roadmaps for the change process
- Establishing new expectations and success metrics
- Offering appropriate training and adjustment time
- Maintaining heightened communication during transition

With the support team at EasyPost, I initiated a redesign process that eventually shifted us from individual account ownership to a tiered support model with specialized teams. We gathered extensive input from team members and customers, mapped transition plans for each account, created targeted training for new role

requirements, and implemented the change in phases to minimize disruption. By acknowledging limitations in my initial approach while engaging the team in developing a better model, we created both improved results and stronger collective ownership of our success.

Manager Redemption: The Journey from Mistake to Growth

Throughout this book, we've explored various dimensions of effective management—from hiring for presence of mind to distinguishing needs from expectations, from building psychological safety to communicating authentically. Underlying all these approaches is a fundamental truth: management is a continuous learning journey, not a destination of perfection.

The managers who make work suck less aren't those who never make mistakes. They're those who transform inevitable missteps into growth opportunities—for themselves, their teams, and their organizations.

The Growth Cycle

Effective managers engage in an ongoing cycle of development:

1. Intentional Practice

Deliberately applying principles and approaches:

- Setting specific management practice goals
- Creating structures that support desired behaviors
- Seeking feedback on implementation effectiveness
- Reflecting regularly on management choices and impacts

2. Mistake Recognition

Noticing when actions don't align with intentions:

- Developing awareness of management patterns
- Creating feedback mechanisms that highlight gaps
- Maintaining curiosity rather than defensiveness

- Viewing errors as information rather than failure

3. Recovery and Repair

Addressing negative impacts appropriately:

- Taking responsibility for management missteps
- Making amends where actions have caused harm
- Resetting expectations and rebuilding trust
- Demonstrating commitment to improvement

4. Integration and Advancement

Incorporating lessons into ongoing development:

- Adjusting approaches based on experience
- Building new capabilities that address gaps
- Sharing learning to benefit others
- Setting new growth edges for continued improvement

This cycle creates an upward spiral of management effectiveness—not because mistakes disappear, but because each cycle yields deeper understanding, greater skill, and more nuanced judgment.

The Manager You Can Become

As we conclude this exploration of making work suck less, I want to emphasize that the principles and practices we've discussed aren't reserved for those with natural management talent or perfect track records. They're available to anyone willing to engage in the continuous learning process that effective management requires.

The manager you can become is:

Someone who values learning over appearing flawless

Demonstrating that growth matters more than perfection:

- Approaching management as a skill to develop, not a trait you possess
- Seeking feedback and perspectives that challenge your assumptions

- Viewing setbacks as opportunities for deeper understanding
- Modeling continuous improvement for your team

Someone who balances accountability with compassion

Holding high standards while acknowledging human reality:

- Expecting excellence while understanding constraints
- Taking responsibility without excessive self-criticism
- Holding others accountable while providing necessary support
- Creating conditions for sustainable high performance

Someone who builds meaning beyond metrics

Connecting work to deeper purpose and values:

- Helping others see the impact of their contributions
- Finding personal meaning in developing others
- Creating environments where authentic connection thrives
- Balancing pragmatic results with human flourishing

Someone who makes work suck less for everyone

Transforming workplace experience through intentional leadership:

- Reducing unnecessary friction and frustration
- Creating conditions where people can do their best work
- Building cultures of trust, respect, and collaboration
- Making management choices that enhance rather than diminish wellbeing

This vision isn't about becoming a perfect manager—it's about becoming an increasingly effective one, learning from inevitable mistakes and continuously refining your approach.

Conclusion: The Manager You Wish You Had

Throughout this book, I've shared principles, practices, and stories drawn from my experience working with managers across various industries and organizations. The

underlying theme connecting all these elements is simple but profound: effective management transforms work from a source of stress and frustration into a source of meaning and growth.

The manager you wish you had—and the manager you can become—isn't defined by never making mistakes. They're defined by how they approach the complex, messy, fundamentally human activity of helping others do their best work.

They're someone who:

- Sees the potential in others and helps them develop it
- Creates environments where authenticity and excellence coexist
- Navigates complexity with both clarity and adaptability
- Balances results with relationship and wellbeing
- Learns continuously from both success and failure

Most importantly, they're someone who makes work suck less—not through superficial perks or motivational slogans, but through the daily practices that demonstrate genuine care, create meaningful challenge, and build cultures where people can thrive.

As you continue your own management journey, remember that each interaction, each decision, each moment of feedback or guidance represents an opportunity to be the manager you wish you had—for your team, your organization, and ultimately for yourself.

Because when work sucks less, life gets better. And making that difference might be the most meaningful contribution your management career can offer.

Let's make work suck less.

CONCLUSION: The Manager You Can Become

We've come a long way together in exploring how to make work suck less—for yourself, your team, and your organization. From the foundations of good management

to specific approaches for common challenges, we've covered the principles and practices that separate managers who merely supervise from those who genuinely lead.

At the heart of this journey lies a simple truth: the manager you wish you had—and the manager you can become—isn't defined by technical skills or industry knowledge alone. They're defined by their ability to create environments where people can bring their best selves to meaningful work.

The Core Principles Revisited

As we conclude, let's revisit the core principles that have guided our exploration:

Presence of Mind Over Technical Skills

The most valuable quality in both hiring and management isn't specific knowledge but the ability to learn, adapt, and maintain clarity amid complexity. Managers who prioritize presence of mind build teams that can navigate any challenge.

Needs Over Expectations

Distinguishing between actual needs and habituated expectations creates clarity, reduces unnecessary conflict, and focuses energy on what truly matters. The manager who can separate "what we need" from "how we've always done it" opens up possibilities for innovation and growth.

Learning as the Foundation

Organizations that learn faster than their competitors win. Managers who foster learning environments—where mistakes become lessons and curiosity trumps certainty—build sustainable advantage through continuous improvement.

Feedback as a Gift

Thoughtful, timely feedback delivered with both clarity and care accelerates development and builds trust. The manager who masters the art of feedback transforms potential into performance.

Boundaries as Protection

Clear, appropriate boundaries preserve energy, focus attention, and prevent burnout. The manager who maintains healthy boundaries for themselves and their team creates sustainable engagement rather than exhaustion.

Integration Across Dimensions

Effective management works simultaneously upward, downward, and across organizational boundaries. The manager who integrates these dimensions creates alignment and removes friction from collaborative work.

Communication That Connects

Beyond mere information transfer, meaningful communication builds understanding and relationship. The manager who communicates authentically creates environments where others feel safe to do the same.

Career Development That Serves People

Thoughtful career guidance acknowledges both organizational needs and personal aspirations. The manager who helps others craft meaningful professional journeys builds loyalty that transcends current roles.

Work-Life Integration That Works

Sustainable performance requires thoughtful integration of work and personal priorities. The manager who respects this reality creates cultures where people can thrive in all dimensions of their lives.

Teams Built on Complementary Strengths

Diverse capabilities combined with psychological safety create teams greater than the sum of their parts. The manager who builds Fellowship-style teams leverages differences as strengths rather than obstacles.

Adaptability Amid Change

In environments of constant disruption, the ability to adapt becomes more valuable than the ability to predict. The manager who embraces uncertainty while maintaining direction navigates change more effectively than those seeking perfect control.

Authenticity Without Career Suicide

Bringing your whole self to work—thoughtfully and appropriately—creates more sustainable engagement and deeper connection. The manager who models appropriate authenticity creates permission for others to do the same.

Reflection That Drives Growth

Structured self-examination and intentional planning accelerate development. The manager who regularly reflects and adjusts makes more progress than those who simply accumulate experience without extracting its lessons.

Recovery From Inevitable Mistakes

All managers make mistakes; great ones transform them into growth. The manager who models effective recovery creates cultures where innovation and resilience flourish.

Your Management Journey

As you continue your own development as a manager, remember that this isn't a journey from "bad" to "good" but from "good" to "better"—an ongoing process of refinement and growth without a final destination of perfection.

The path forward involves:

Continuous Learning

Stay curious about management approaches, organizational psychology, and human dynamics. Read widely, seek diverse perspectives, and regularly update your mental models based on new evidence and experience.

Deliberate Practice

Identify specific management capabilities you want to strengthen and create intentional opportunities to develop them. Seek feedback, reflect on results, and adjust your approach based on what you learn.

Community Connection

Build relationships with other managers who share your commitment to making work suck less. Exchange ideas, challenge assumptions, and provide mutual support through the inevitable challenges.

Compassionate Self-Assessment

Regularly evaluate your management approach with both honesty and kindness. Acknowledge areas for growth without harsh judgment, and celebrate progress without complacency.

Values Alignment

Continuously refine your management approach to reflect your deepest values and purposes. Let your authentic convictions guide your development rather than merely adopting trendy practices.

The Ripple Effect

The impact of becoming the manager you wish you had extends far beyond your immediate team. When you create environments where work sucks less:

- Team members experience greater wellbeing and fulfillment
- Organizations benefit from higher engagement and innovation
- Families receive people who aren't depleted by work stress
- Communities gain citizens with more energy for contribution
- Future managers learn from your example

Perhaps most importantly, you yourself experience work as more meaningful and rewarding—creating a virtuous cycle where your own engagement fuels your ability to improve others' experience.

A Final Thought

Throughout this book, we've used the Fellowship of the Ring as a metaphor for effective teams and leadership. There's one final lesson worth extracting from Tolkien's epic: the most important journeys aren't undertaken alone.

The quest to make work suck less isn't something you accomplish in isolation. It requires community, support, and shared commitment to creating workplaces where people can thrive.

As you apply the principles and practices we've explored, remember that you're part of a larger fellowship of managers working toward similar goals. Your individual efforts, combined with those of like-minded others, create the momentum for broader transformation in how work happens.

The manager you can become isn't just better at management techniques—they're part of the solution to one of our most significant collective challenges: making the activity that consumes much of our waking lives a source of meaning and growth rather than frustration and depletion.

That's a quest worth undertaking.

Let's make work suck less.

Peter Durlacher