

Becoming a Holistic Leader

Strategies for Successful Leadership
Using a Principle-Based Approach



Second Edition

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Cover

Special thanks to Aaron Curtis McLean for the cover design.

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Leaders need to create a safe space to foster collaborative inquiry, creativity and innovation.

James Taggart

Becoming a Holistic Leader

Dedicated to

To Lily and Ashley

As you grow, may you find your leadership within and share with the world.

Becoming a Holistic Leader

Table of Contents	Page
<u>Preface</u>	vi
<u>Foreward</u>	vii
<u>Introduction</u>	ix
<u>1 – A Personal Reflection</u>	1
<u>2 – Setting the Stage</u>	4
<u>3 – Personal Principles – the Guiding Light</u>	8
<u>4 – The Right-Hand, Left-Hand of Management and Leadership</u>	16
<u>5 – Holistic Leadership</u>	23
<u>6 – Teaching</u>	28
<u>7 – Directing</u>	32
<u>8 – Participating</u>	36
<u>9 – Nurturing</u>	40
<u>10 – 10 Valuable Lessons for Aspiring Holistic Leaders</u>	45

Becoming a Holistic Leader

<u>11 – Finding Your Own Voice</u>	48
<u>About the Author</u>	51
<u>Acknowledgements</u>	52
<u>Appendices</u>	55
<u>Questions for Reflection and Inquiry</u>	56
<u>10 Ways to Earn Respect as a Leader in the Workplace</u>	59
<u>Recommended Leadership Books</u>	61
<u>Web Site Resources</u>	63
<u>References</u>	65

Becoming a Holistic Leader

Preface

A lot has happened around the world since *Becoming a Holistic Leader* was first released some 16 months ago. The international financial system teetered on collapse, the Great Recession exerted sweeping, pernicious effects (which still linger) and the globalization of work continued its relentless march forward.

At the outset of 2011, turmoil exploded in many countries in the Middle East and North Africa as citizens took to the streets to demand meaningful change from their national governments. Self-empowerment in action.

I am not a purveyor of the future; indeed who is? As with this e-book's first edition my primary aim is to assist you surf the waves of change and to respond quickly to new trends. Above all, I want you to embrace change; fear should be replaced with enthusiasm and curiosity. Seek out and explore the opportunities.

I've personally gone through a major change in the past few months. After three decades of working for the Government of Canada, I retired in December 2010. It was an easy yet difficult decision. Easy, because I had grown weary of the inertia, turf protection and lack of focus on serving citizens. Difficult, because I would be leaving a secure job and venturing out into the unknown. But I had to get out of a culture that stifled creativity and innovation. I began my working career in consumer lending in 1978, and now I'm working as a leadership and organizational learning consultant through my new company, Taggart Leadership Consulting Inc. I'm enjoying my new gig. Freedom in action.

I take pride and enjoyment that *Becoming a Holistic Leader* has been read around a large part of the world: from Malaysia and Australia to North America to the United Kingdom, Europe and North Africa. Those are the countries and regions of which I know where my e-book has been read; perhaps there are others.

Thank you for your feedback, loyalty and trust.

Jim Taggart
Ottawa, Canada, May 2011

Foreword

I have known Jim Taggart since 1998. We met during our two-year learning journey at Royal Roads University while completing our Masters degrees in leadership. Jim always struck me as a pattern thinker and someone who could capture the essence of his thinking in a few words. He enjoyed writing his thoughts and shared them broadly and generously. In fact, I still have on my computer from those many years ago a folder called Jim's Writing.

I have followed Jim's career, thoughts and writing and his current blog, Changing Winds. He takes the initiative to stretch and learn and dig deep into the leadership thought literature. As an author of two books and over 25 curriculum publications myself, I am deeply honoured to write this foreword to give you some insight into Jim's new e-book, *Becoming a Holistic Leader*.

Jim expresses his leadership through his writing in a friendly open style that encourages the reader to continue reading on. In *Becoming a Holistic Leader* we see snippets and stories of Jim's life; we see his leadership journey and struggles, his thinking and, above all, he shares with us his philosophy, the Holistic Leader Model, and ten personal principles by which he lives his leadership.

Jim tells us his model is a "culmination of how leadership and management should be combined together as an integrated practice" and is founded upon the premise that each of us must strive throughout our lifetime to "become a balanced, centered individual who is able to effectively use the four principal components of leadership: teaching, directing, participating and nurturing."

Jim's model resonates well with my knowledge and study of leadership. He gives us much to think about with strong leadership quotes, personal leadership stories and reflection, and, as usual for Jim, strong reference to the leadership literature to support his thinking. The essence of his suggestion that each of us "must step up to the plate and exercise our own leadership in order to contribute to building a better society" is a critical call to action for leaders at all levels today. We need to effectively lead ourselves out of the mess we have created on this planet, and

Becoming a Holistic Leader

this takes shared leadership. We need to find within ourselves the answers to the questions we are almost afraid to articulate.

Becoming a Holistic Leader provides us with not entirely new thinking, but rather a fresh look at the value and importance of integrating management and leadership so that they work synergistically together. Jim's principles are deeply personal and he openly shares them with the reader, not so much that you will adopt them or consider them the principles to follow, but rather to reflect upon and think about them and to spur you to action to examine and articulate the principles you hold to be true for you. Having principles, as Jim says, is a guiding light.

Strategically placed throughout this e-book are questions for reflection. Questions are near and dear to my heart as I live with provocative, powerful questions every day, challenging myself to explore and think about possible answers. It is through reflection that we learn, integrate and are able to apply our new knowledge to different situations. Jim has wisely provided the reader with questions to personalize the learning.

The term engagement is used widely in organizations today as something of which we need more. We need people to take initiative, to lead and to influence from where they are, to bring forth innovative new ideas, and to give discretionary effort. Jim hits it on the mark and addresses this through his integrated model, illustrating that leadership for those without position is perhaps best demonstrated through engagement behaviour. This is an interesting twist and one that will likely come out more strongly in the literature as engagement and leadership are examined together.

Jim helps us understand that "coping with complexity and change" are the functions of management and leadership together. Separating complexity from change is near impossible, it and does little good to understand one without the other. Therefore, separating management and leadership does not help us; we are better to examine the whole.

The Holistic Leader Model explanation helps us see how the four components are not just interdependent but reflected in the web of relationships throughout the organization. The six amazing leadership stories Jim highlights for us are not typical leaders. Rather, they are people who have tapped into themselves and become Holistic Leaders, recognizing that their leadership comes first from their

Becoming a Holistic Leader

own self-awareness and is balanced and integrated in the complexity and change of the situations they face.

Jim gives us in his closing an opportunity to challenge ourselves: to articulate our personal principles and follow them, to explore how the Holistic Leadership Model works for us and what we can learn, and finally to reflect on our own personal experiences as a leader.

This e-book is a solid piece of reflective leadership story-telling, coupled with a proposed model and principles to help you examine your own leadership. Whether you are a positional leader, a first line supervisor or what Jim calls a thought leader or networked leader, you will benefit from reading this e-book. Jim's writing has not only grown stronger in the intervening years since we first met, his thought leadership is now influencing leaders everywhere. Work on *Becoming a Holistic Leader*; the journey will be well worth it.

Debbie Payne, M.A.

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Co-author: Payne, D. and Hagge, E. (2009) *Tri-namics Power of One, Two, Three: Provocative Questions for Leadership Wisdom*. Deberna International.

Introduction

I've been a student of leadership for some 20 years. What I've come to realize is that as I continue to learn through experience, reading, talking to people and writing on the subject that more doors open to what I'll call the unknown. My realization is that we're never "there," and that in fact we're always arriving, seeking to improve our knowledge and understanding of the world around us. My retirement from the Government of Canada in December, 2010, after 28-plus years of service has moved me into a new realm of learning and understanding.

When you look at our rapidly changing world the need for building strong personal adaptability is becoming ever more critical, whether you're dealing with work, home or community issues. At the core of this is our pursuit to enhance our personal leadership. However, to do this—and do it well—means that each of us needs to embark on a journey of self-discovery and self-awareness.

My aim in this e-book is to help you in your journey to become an effective leader. If you consider yourself already to be a good leader, then I hope to assist you to become an even better one. Whether you're part of Generations X or Y, or a Baby Boomer like me, the information in this book is very relevant.

Why? Because none of us are ever "there." Leadership is a lifelong study and pursuit. And there's something else: my personal philosophy of leadership is that it resides at all levels of organizations and communities; leadership is to be shared if we're to achieve great and lasting results.

The distinguishing difference between management and leadership, as I've explained to many people over the years, is this: managers are appointed to their positions; leadership must be earned. If you have no followers, you're not a leader. For some people these words are undoubtedly hard to accept, but they're reality. If you occupy a senior managerial position and have become frustrated in the past with lackluster results from change processes you've initiated, a diagnosis

Becoming a Holistic Leader

will typically reveal that employees were never enrolled and aligned from the beginning. Compliance is not the same as commitment.

You may be a manager of nurses in a hospital, high school teacher, civil servant, bank manager, municipal mayor, airline pilot, restaurant manager, entrepreneur or CEO of a multinational. If you aspire to be more effective as a leader—and as a member of society—the information and lessons contained in this book will be of worthy assistance to helping put you on the right path.

The contents of this book, therefore, are what I'll call synthesized knowledge: pulling together current and past personal experiences and thinking on leadership and management.

Although I use the word leadership throughout this book, I want to emphasize the critical importance of the role that managerial skills play in our organizations and communities. For that reason, I have included at the beginning a chapter on what I call the right-hand and left-hand of management and leadership.

The Four Principal Components of Holistic Leadership:

- *Teaching*
- *Directing*
- *Participating*
- *Nurturing*

This discussion is very important because of the distinct yet complementary roles of management and leadership. It's about achieving balance in how one goes about managing and leading in complex and changing environments.

This is where Holistic Leadership enters. It's the culmination of how leadership and management should be combined together as an integrated practice. Holistic Leadership may therefore be defined this way: Throughout our lifetime, each of us needs to work towards becoming a balanced, centered individual who is able to effectively use the four principal components of Holistic Leadership: **teaching, directing, participating and nurturing.**

To support the journey towards achieving this integration, I present a set of personal principles that serve as a guiding light and which form the core of this e-book. With that said, let's begin the journey of discovery and enlightenment.

1

A Personal Reflection

I was just about to turn 23, clutching a newly minted B.A. in economics, and hoping to find employment quickly. Dateline: May 1978, Saint John, New Brunswick, Canada. I was fortunate shortly after graduating to secure a job as a loans officer with a finance company in the same city.

There are jobs that build character, to quote a former colleague, and those that don't. Well, this one certainly did. Not only was I expected to bring in new loans and mortgage business, but to also collect delinquent payments. In effect, my job was to find new business and then go chase those customers who fell behind. But I certainly learned a lot, especially working in a tough port city.

After two years I had had enough. I was finding it too painful collecting money from single mothers, while at the same time I was a new dad with a baby girl, but seeing a great deal of painful scenes at the homes where I showed up on the doorstep at month end.

I've never regretted working for that finance company, despite in the end finding some of their practices unethical. But the irony is that one of the best bosses I've had in over 30 years in the workforce was with this company. His name was Arnold, and he was one of the most decent, humble and honest people with whom I've worked. If you made a mistake he knew how to give you constructive feedback so that you learned immediately and didn't repeat it. He helped coach new staff, especially when it came to company policies and procedures, of which there were many.

Becoming a Holistic Leader

I recall one occasion when he thought he had offended me for something he had said. Shortly afterwards he came over to my desk to apologize. Had I been offended? Not in the least. But Robert was sensitive to his staff and made great efforts to be fair and consistent in how he managed our small office.

Fast forward almost 20 years. By then I had worked many years as an economist, advanced to a regional manager, and had jumped with both feet into the leadership field. My boss for several years was a great woman, Louise, who held a senior position. We worked exceptionally well together. She loved the big picture perspective and doing innovative work. I was regularly conceiving new ideas, but being task-oriented I liked to get things moving. It was almost like a Vulcan mind-meld (of Star Trek fame) when we started talking about new ideas.

Who am I as a leader, and how may I exercise my own voice?

Working in large bureaucracies can be especially frustrating, whether in the public, private or non-profit sectors. I remember one occasion when I was in Louise's office, moaning about my frustration with some peer managers. She stopped me, looked me in the eye and said: "Jim, when you represent me at meetings, you have my power and speak with my voice." I was speechless for a moment. I had never heard a senior corporate leader ever say anything like that, nor have I heard anything like that since.

This is what we should want—and expect—from those leading at the top: sharing power with those below. But with that comes responsibility. When you're given that opportunity, such as that day in Louise's office, you don't squander or abuse the trust that's been vested in you.

I've learned a lot during the past three decades about leadership, especially when it comes to my own strengths and limitations. Some of the key lessons from which I've drawn center on how leadership needs to be shared, how each of us needs to work continually at improving our leadership capabilities, and how leadership is intertwined with the practice of management.

As you proceed through this book, take the time to reflect on your own leadership, asking yourself: "Who am I as a leader, and how may I exercise my

A Personal Reflection

Becoming a Holistic Leader

own voice?” Many of us will never get the chance to work for people like Arnold and Louise, but that should not hold us back from discovering the leader within each of us.

A

leader is best when people barely know he exists, not so good when people obey and acclaim him, worse when they despise him.

But of a good leader, who talks little, when his work is done, his aim fulfilled, they will say: “We did this to ourselves.

Lao-Tzu

2

Setting the Stage

The old adage “change is constant” would appear to be more true today than in the past. Just witness, for example, the turmoil during the 2008 financial meltdown, the Great Recession (and its lingering effects) and the fear over the effects of environmental degradation. But change is not constant; it doesn’t arrive at a steady pace. The reality we face is what British management thinker Charles Handy has called *discontinuous change*, that major change events come in unpredictable bursts. The past three years are a testimony to the significant changes we’ve experienced in the global economy.

Along a similar track to Handy’s thinking is what author Nassim Nicholas Taleb¹ describes as 'Black Swan' events in his book by the same name. For Taleb, such events are of large magnitude and exert significant impacts on society.

Regardless of how one wishes to describe change, our current reality is placing new pressures on leadership in business and government. How leadership is embraced and practiced from this point forward will heavily influence our collective future.

Before we leave this topic to delve into leadership, one other critically important aspect of change needs to be acknowledged: the turmoil that society has been going through as people try to cope with the effects of global competition, demographic change, technological advancement, population migration and immigration, and changing value systems. For example, as much as Canada and

¹ The expression Black Swan dates back to 17th Century Europe when it was argued that all swans were white, and hence became a symbol for an occurrence that could not exist. Later in the 18th Century when black swans were found in Australia, the expression evolved to meaning a once-believed impossible event that could arise.

Becoming a Holistic Leader

the United States are struggling with an evolving racial and ethnic mix due to new sources of immigration, both countries are doing relatively well (even acknowledging the U.S.-Mexico border issues). In contrast, just look at the escalating tensions over immigration in such countries as Great Britain, France, Germany and Sweden.

This raises the issue of diversity in the broadest sense: inter-generational workplace challenges, cultural differences at the societal and firm levels, and transnational corporations that operate around the clock, seven days a week with workforces comprising dozens of nationalities. Furthermore, the changing nature of the traditional employment contract is creating new tensions as workers face job insecurity and the prospects of reduced or evaporated pension plans. This is just a sampling of the changes that will increasingly influence behaviors in organizations in the coming years. The consequences on how leadership is practiced in the future are daunting, stimulating the need for a more holistic form of leader.

The pressures that society is facing from these changes and the implications for leadership were brought home to me when I re-read John W. Gardner's 1990 book *On Leadership*.² Reprinted in 1993 in paperback, Garner's comments came on the cusp of the arrival of newly elected President Bill Clinton. The country was excited, but Gardner took a moment to speak about America's challenges and its declining shared value system. When asked by a politician shortly before the 1992 election what he thought was the most important thing a leader could do for America, Gardner replied: "Give them back their future."

As much as the world has changed dramatically in the past two decades, people are still calling out to be heard. Witness the rallies in the Fall of 2009 on Capital Hill, the Tea Parties and other protests where many Americans want change. Just read the news to see a country that is in a deep struggle with its shared values—or what were once shared values. More recently, look at the incredible events that occurred in February 2011 in Tunisia, Egypt, Libya and several other Middle

² John W. Gardner (1912-2002) was a professor of psychology at the University of California, a U.S. Marine Corps officer during World War II, and later president of the Carnegie Corporation; US Secretary of Health, Education and Welfare; chairman of the National Urban Coalition; and founding chairman of Common Cause. He also served under President Kennedy, leading various task forces, including serving under Presidents Carter and Reagan. He received the Presidential Medal of Freedom in 1964, the highest civil honor in the United States.

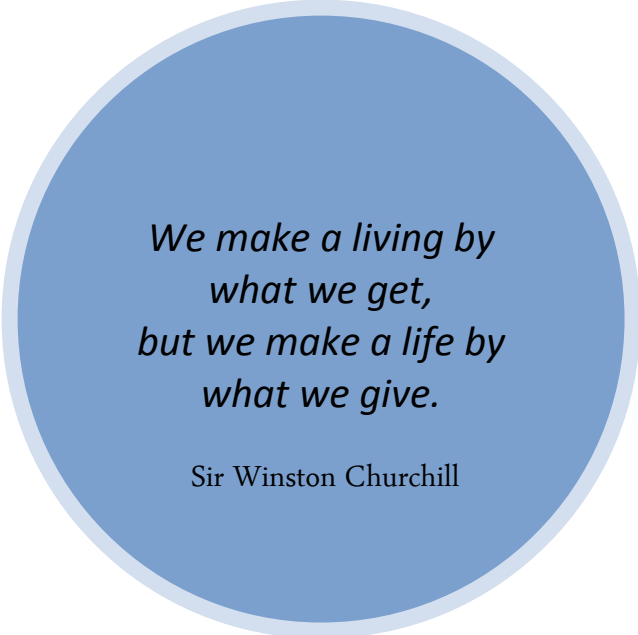
Becoming a Holistic Leader

Eastern countries and North Africa, facilitated through social media. It is becoming impossible to predict when, where, what and how change will happen.

Becoming a Holistic Leader is not just about how each of us functions within organizations, public and private. It's much more encompassing than that, transcending organizational walls. It's about how we empower ourselves to effect meaningful change, understanding the interdependencies across society, business and government. John Gardner expressed this beautifully over 25 years ago:

"...we come to see that much of the responsibility for leaders and how they perform is in our own hands. If we are lazy, self-indulgent, and wanting to be deceived; if we willingly follow corrupt leaders; if we allow our heritage of freedom to decay; if we fail to be faithful monitors of the public process - then we shall get and deserve the worst."

Yes, we should hold our public figures to account, as well as those leading corporations. Each of us, however, must step up to the plate and exercise our own leadership in order to contribute to building a better society. Otherwise, we face the dire prospect expressed by Gardner. We can do better.



*We make a living by
what we get,
but we make a life by
what we give.*

Sir Winston Churchill

Setting the Stage

3

Personal Principles – The Guiding Light

For an organization to progress to a higher state of thinking and doing on leadership, so that it eventually becomes a natural way of how people demonstrate their own leadership, a guiding set of principles is a helpful way in which to get pointed in the right direction. Call it The Guiding Light, or perhaps compass is preferred by some. The point here is to lay a foundation at the onset to enable the organization to chart its course for the future.

When the waters get rough, having a set of personal principles will make that period less chaotic for each of us. If we wish to avoid getting caught in the trap of poor leadership practices, a set of guiding principles will serve as our guidepost. They're especially helpful when we face turmoil in our lives, whether at work, home or in our communities. By working continually to staying true to these principles, we'll be better able to remain centered and focused when leading.

Even though these principles are my creation and I strive to follow them, I'm not always successful. It's clearly a journey. But they're developed from my personal experiences over the past 30-plus years, and hence there's a certain degree of accumulated wisdom contained within.

Each of us needs to establish our own set of guiding principles that we personally own; if we do not, it will be a perpetual struggle to remain on course. Therefore, please consider the following principles something to consider and reflect upon. Then take action to create a set of principles that *speak to you* and that will become *your* guiding light. At the end of each guiding principle I share a personal experience to emphasize its relevance and importance.

Personal Principles – The Guiding Light

Becoming a Holistic Leader

1) I own my morale and attitude.

No one but me determines whether I'm happy with my job. If I don't like my work environment, then it's up to me to empower myself to either improve my work situation or to seek opportunities elsewhere.

In my second year with a finance company, when I was in my early twenties, I became quite disenchanted with the pain I was seeing in people's lives. I was unhappy with my work (chasing customers for late payments) but didn't know what to do. The situation finally came to a head. It was a difficult decision, since Sue and I had a new baby and I was the major breadwinner. We came up with a plan which involved financial sacrifices and I went back to school to do a Masters degree. It was one of the best decisions of my life.

Over the years I worked with many people who were miserable in their jobs. But rather than look at other possibilities and making the decision to either improve their situation or move on to something else, many of them remained mired in their misery, which in turn affected working relationships with their co-workers. Above all, their misery did not help their personal health and family relationships.

Each of us has a choice to make.

2) I communicate in a clear and honest way.

When I speak to my co-workers, staff, clients and stakeholders, I ensure that I am unambiguous and forthright. If I'm in a position to give performance reviews, then I do so in an honest, constructive way that promotes improvement. Finally, when I communicate to my superiors I speak truth to power, never sugar-coating issues or manipulating information for my own gain.

I'll never forget what one of my assistants said to me one day many, many years ago. Julie had worked for a variety of bosses. I can't recall the context,

Personal Principles – The Guiding Light

Becoming a Holistic Leader

but there were some issues in my unit I was trying to address. She said to me out of the blue one day: “Jim, I always know where your head is at.”

These words, decades later, still reverberate within me. I fervently believe that when you’re in a leadership position that you need to park your personal issues at the organizational door and communicate transparently and consistently with your followers. What Julie was saying to me that day is that I didn’t play head games with staff, and that what I said was what I meant, and that what I meant was what I said. Reflect on that.

Thanks Julie. You helped keep me on the straight and narrow all those years.

3) I share the information I have access to openly and without reservation.

Protecting my turf is something to which I abstain. I refuse to be a gatekeeper of information and share what I learn. Instead I work across organizational boundaries, promoting collaboration and information sharing. I am transparent in my actions and beliefs.

Perhaps I’m an oddball, but I REALLY believe in sharing information openly. Whether it was in 1982 or 2011, I share what I know and expect that of others. During my career I tried to model this behavior consistently. When I was leading teams, both intact and project-based, I emphasized the importance of sharing information.

Hoarding information is for the power-trippers and the insecure. Sharing information openly is for those who seek to understand the unknown, who wish to exceed customers’ expectation and who have a passion for learning and infecting others with it.

Where do YOU stand?

Becoming a Holistic Leader

4) I embrace lifelong learning and encourage the same in my co-workers.

Whether it is being a coach, mentor or mentee, I continually strive to learn new ideas and how to apply them and to share them with my co-workers. I never arrive for I am on a lifelong journey.

The best boss I've ever had is someone I've known for almost three decades. We've come in and out of one another's consciousness over the years. First, we worked collaboratively to do the most progressive change leadership work in our organization, back in the nineties. I later moved on to other organizations, but we checked in occasionally, sharing thoughts. More recently, in early 2011 (now that we're both public service retirees) I helped her once again with project work.

I've spoken about my Jazz piano teacher in some of my blog posts. Brian, 71, has played professionally for five decades and is a master at his craft. Yet he strives to learn continually, experimenting with new voicings and creating new Jazz compositions. Brian has instilled in me the mindset that you're never "there" when it comes to not just playing the piano but more broadly any endeavor one undertakes.

Are **you** "there" yet?

5) I am humble in my interactions with others.

There are always others who possess more knowledge and capability than I. I have much to learn from these individuals and welcome their wisdom. There are many unknowns of which I am unaware.

*As each of us moves forward in a volatile labor market, characterized by continuous change, we need to accept that we don't know everything. During the past two years I entered the realm of blogging. While I still have a lot to learn, I was a total neophyte at the outset. I have learned an incredible amount from very experienced and respected bloggers, and continue to seek out advice and perspectives from others with much more know-how than I. Are **you** humble?*

Personal Principles – The Guiding Light

Becoming a Holistic Leader

6) I have the backs of my co-workers and staff.

Protecting those I care about and respect is central to my being. I don't tolerate others talking about my co-workers and friends behind their backs. If I'm serving in a managerial position, I stand behind my staff during times of difficulty; I never sell them out for my own gain.

If there's one thing that drives me into the stratosphere it's managers who abandon their staff during times of organizational stress. If you're not prepared to take the hit for your team then get the heck out of a leadership position. I got into hot water on a few occasions when I defended the actions of some of my team members. However, it was my job as the manager to stand up for them.

Yes, I believe in accountability. However, there's a whole lot of talk and espoused management chatter about risk-taking and the need to innovate. Yet when mistakes are made or the desired results don't materialize, fingers get pointed at staff.

*Are **you** prepared to stand up for your team?*

7) I share leadership unreservedly.

Knowing when to step back and let someone else lead is something I accept without reservation. I know when to check my ego. And I understand that when leadership is shared throughout the organization that an incredible power of creativity and energy is unleashed.

My Master's leadership thesis was on shared leadership. But I had a journey to get there, from being a micro-manager at the outset to delegator. I went through the insecurity and pain of letting go, where I wanted to be in control. Stupid. When I finally figured it out, largely due to younger staff who didn't have time for bullshit from a controlling manager, things started to rock 'n roll. Service to our clients exploded. Everyone was buzzed. And I finally had a lesser workload.

Personal Principles – The Guiding Light

Becoming a Holistic Leader

Are **you** a micro-manager? Be honest.

8) Be open to outcome.

We live in a world where uncertainty and discontinuous change are the new normal. There will be many Black Swans of change. I accept this and remain open to change, the challenges and opportunities it presents, and the dance of life.

*The most important words of wisdom for me come from Angelis Arrien, anthropologist, leadership consultant and author of *The Fourfold Way*: “Be open to outcome, not attached to it.” These words have helped guide me through many organizational changes. If there’s one thing you get from this e-book it is Arrien’s words of wisdom. They are more important now than when uttered 15 years ago. They are intertwined with lifelong learning.*

How open are **you** to change?

9) I know how to take a joke.

Being able to poke fun at myself, especially when it comes to acknowledging mistakes, is something of which I’m not afraid; I learn from such experiences. And I know never to make fun of others at their expense.

I was in a bad mood. I’d just returned to the office after an early morning negotiating session with our provincial government partner. It also happened to be my birthday. I walked into my office to find waist-high rolled up newspaper. Now I understood the piles of newspaper in my team’s cubicles in the preceding weeks!

At first I was momentarily pissed off, not saying anything but getting a little steamed. But I quickly got a grip. My team wouldn’t have done this if they hadn’t respected me as their leader. It was about having some fun, something that my unit had earned the reputation. Yes, we cranked out

Personal Principles – The Guiding Light

Becoming a Holistic Leader

product and provided superb service to our clients, but we sure had a lot of laughs along the way. We're human beings, right?

What was great about this experience was that my boss wrote me a memo warning me to clean up my office. Fantastic. I still have the memo.

*Does **your** organization encourage humor?*

10) I am a custodian of Earth and am environmentally responsible.

Stewardship is a vital tenet of who I am as a human being. I'm here for a brief period—a nano-second in time. But during this short interlude, I act responsibly in my interactions with Planet Earth and its inhabitants.

I certainly cannot claim to be a true custodian of the earth. I recycle, use public transit and try to minimize the use of our one family car. I admire Generations X and Y who seem to be farther along the path to environmental stewardship than we Baby Boomers. But before becoming too excited with what I've just stated, take a hard look at your personal lifestyle and its impact on Mother Nature.

Be honest with your assessment.

Questions for Reflection:

- a) Think about some great leaders you've worked for or seen in action. What appeared to be their strongest principles in how they led others?
- b) What principles do *you* want to guide you in exercising your leadership?
- c) What aspects of yourself will you start to change, based on these principles?
- d) Ask yourself at the end of each day: "What actions did I take, or not take, that showed my commitment to these principles?"

Personal Principles – The Guiding Light

Becoming a Holistic Leader

e) What will I do differently tomorrow?

The above ten principles permeate this book. Although I'll be talking about management versus leadership in the next chapter, and my Holistic Leadership Model afterwards, maintaining a focus on the principles will make the messages in this book that much more meaningful. The purpose of the next chapter is to help clarify the complementary relationship between management and leadership roles.

4


The Right-Hand, Left-Hand of Management and Leadership

Lifting the Veil

Confusion over the two words management and leadership continues on, despite a huge volume being written on the topic during the past two decades. The two words are frequently used interchangeably, but typically without adequate understanding of their different yet complementary functions within organizations. McGill University professor and recognized leading thinker on management, [Henry Mintzberg](#), has argued for a long time that our organizations have been over-led and undermanaged.

What Mintzberg's referring to is the strong bias in the literature towards leadership during the past 20 years. He believes that not enough attention has been paid to understanding the actual work of managers and how they make decisions and lead in the workplace.

Getting a good grasp, therefore, on how the two functions of management and leadership work together to form a whole approach is vital if we wish to see our organizations and communities well lead and managed. For the purposes of this book, it's very important to understand how the two can be integrated if one wishes to become a Holistic Leader.



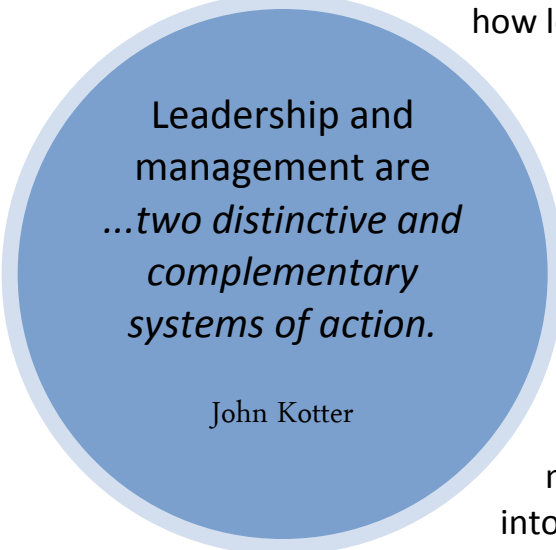
*... organizations
have been
overled and
undermanaged.*

Henry Mintzberg

Becoming a Holistic Leader

At the heart of the issue is the question: *who* is a leader in our organization or community? Is leadership specific only to management positions? If so, then leadership is positional in the organizational hierarchy. Or is leadership seen by senior management as being more inclusive, in which people at all levels in the organization are encouraged to develop their leadership abilities and share in the decision-making process? The same applies to the community, where instead of city council and the mayor possessing the monopoly on decision-making they invite citizens to participate in a *meaningful* way.

When we're able to clearly articulate what we mean by 'leadership' we've started towards the creation of a common vocabulary and set of expectations in our organizations and communities. From this will emerge a culture that is defined on how leadership is *perceived* and *practiced*.



Leadership and management are
...two distinctive and complementary systems of action.

John Kotter

If an organization chooses the path of participative leadership, as it recreates its corporate culture, the challenge will be how to create a culture that reflects both management and leadership development. For employees in management positions, there is a rapidly growing need to have an approach that embraces *both* management and leadership competencies. For aspiring managers, these employees need to be factored into the process. The urgency for this is rising as the existing management cadre begins to retire in large numbers over the next few years. Those seeking to move into management are the succession pool, and hence require sustained attention in terms of their developmental needs.

But not everyone wants to be a manager. For those who don't have such aspirations, the added challenge is how to encourage their leadership development, in the sense of their participating more in decision-making and in taking more initiative. This assumes that senior management wishes to support the creation of a "leaderful" organization because of the benefits this would bring.

So now let's take a look at the main differences between management and leadership.

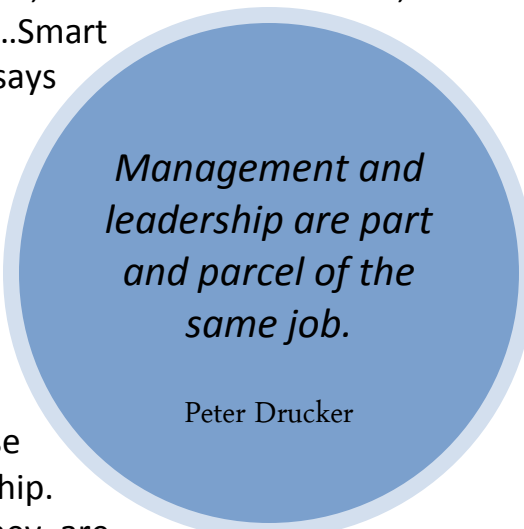
The Right-Hand, Left-Hand of Management and Leadership

Becoming a Holistic Leader

Seeing the Light

In this section, I refer to some of the most prominent thinkers on management and leadership to provide a concise synthesis of the main differences. To start off, [John Kotter](#) sees leadership and management as “...two distinctive and complementary systems of action.” While each field has its own unique characteristics and functions, *both* are essential for managers if they’re to operate successfully in complex organizations that are subject to discontinuous change. To focus strictly on leadership development may produce strong leaders, but the consequence will be weak management. And the converse is true. How to combine strong leadership and strong management, so that there’s balance, is the real challenge. As Kotter notes: “...Smart companies...rightly ignore the literature that says people cannot manage and lead.”

The late [Peter Drucker](#), seen as the 20th Century’s most respected authority on management, saw the interrelationship between the two. He didn’t believe that management and leadership could be separated. In fact, he once stated that it was: “...nonsense, as much nonsense as separating management from entrepreneurship. They are part and parcel of the same job. They are different to be sure, but only as different as the right hand from the left or the nose from the mouth. They belong to the same body.”



Management and leadership are part and parcel of the same job.

Peter Drucker

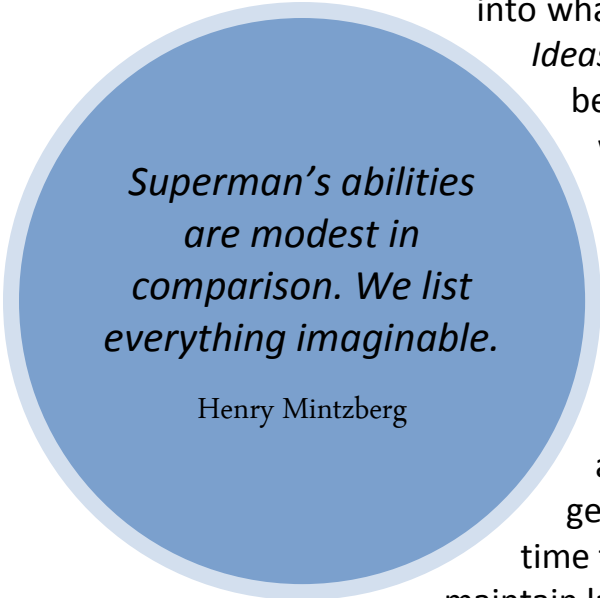
Management has been defined more than once as consisting of planning, directing, controlling and coordinating. [Bolman and Deal](#) comment on this: “How does one reconcile the actual work of managers with the heroic imagery?... Control is an illusion and rationality an afterthought.” People will only follow provided they believe their leader is legitimate. Their voluntary “obedience” evaporates, along with the leader’s authority, when the leader loses legitimacy. This is similar to my earlier point about management being appointed and leadership being earned.

The Right-Hand, Left-Hand of Management and Leadership

Becoming a Holistic Leader

An interesting perspective on the subject comes from [Sally Helgesen](#), who makes an important point on equating leadership to position: "...our continued habit of linking leadership with position signals our inability to grasp how organizations are changing....in the future, our ideas about the nature of leadership will undergo a radical transformation." What this new leadership will look like and what qualities it will embody are important issues.

Then there's the view of Henry Mintzberg who has conducted empirical research into what managers really do. In an interview with CBC's *Ideas*, Mintzberg explained that managers "...sit between their organizations and the outside world....they manage information in order to encourage people to take action."



*Superman's abilities
are modest in
comparison. We list
everything imaginable.*

Henry Mintzberg

He refers to the 'myths' of managers planning, organizing, coordinating and controlling, noting that when one observes managers at work, it's difficult to determine if they are actually engaging in these activities. Managers get interrupted continually, and spend a lot more time talking to people than reading. They develop and maintain large people networks.

In discussing the role of management in organizations, Mintzberg observes that those managers who place more emphasis on building lateral relationships, compared to vertical relationships, are operating in a contemporary mode. The rise in importance of knowledge workers (the highly educated and skilled professional employee) means that managers can no longer treat their staff in ways that were once considered acceptable. His introduction of the expression *lateral managerial relationships* introduces a new meaning to management, and especially its connection to leadership.

This redefinition of management, in terms of the people factor, leads Mintzberg to state that the 'professionalization' of management has undermined this discipline. By this, he means the formal training programs in business schools that allegedly produce 'managers.' He notes that while management is critical for ensuring that

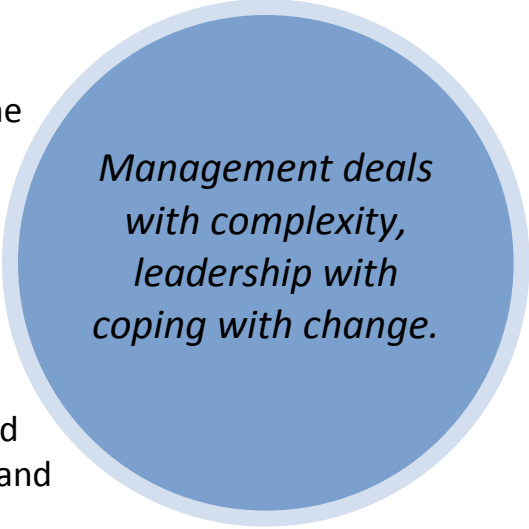
The Right-Hand, Left-Hand of Management and Leadership

Becoming a Holistic Leader

organizations do what they are supposed to do, it's also important that we understand that our organizations exist for people, not the converse.

Where does leadership fit in his perspectives on organizations? The lists of attributes and characteristics of leaders, as described in countless books and articles, leads Mintzberg to state: "...Superman's abilities are modest in comparison. We list everything imaginable." For Mintzberg, good leaders are candid, open, honest, and share information with people. The issue of truth is fundamental to Mintzberg's stand on leadership. "People have agendas," he notes, and consequently they hoard information and do not disclose their true feelings. The work of senior leaders becomes more difficult because they are often unable (or do not wish) to find out what is really going on in their organizations.

What this means for organizations is this: when one enters an organization it can be sensed. Some call this *the smell of the place*, which can be positive or negative. Where it's positive, it's apparent that there's abundant energy present and that it's focused. People enjoy going to work because they understand where they fit into the organization's vision and what their roles and responsibilities are. They're fully committed and present in mind, body and spirit.



*Management deals
with complexity,
leadership with
coping with change.*

This is the challenge, therefore, of weaving together the roles of management and leadership so that they form a coherent whole, with respect to how the work gets done in organizations. But what can we say about the key distinctions and complementarities between management and leadership, which Holistic Leadership comprises? The next section summarizes the commonly agreed upon functions of management and leadership.

The Right-Hand, Left-Hand of Management and Leadership

Becoming a Holistic Leader

Management & Leadership as Functions

Management is about *dealing with complexity* within organizations and the surrounding environment. In the absence of good management practices, organizations fall into chaos, which in turn threatens their survival. One can say, therefore, that management brings order to organizations and consistency to the products and services they produce.

Leadership, in contrast, involves *coping with change*. It's about movement and initiating and maintaining change throughout the organization. In a world experiencing discontinuous change, this key feature of leadership is becoming increasingly valuable to organizations.

These two features, coping with complexity and change, shape the functions of management and leadership. Kotter, for example, explains there are three primary tasks within organizations:

- 1) determining what work needs to be done,
- 2) forming the networks of people to do the work,
- 3) ensuring that the work gets done properly.

Management and leadership, while both addressing these tasks, approach them from different perspectives.

Planning

Planning, budgeting, and resource allocation are activities initiated through the *management* function in an effort to address the issue of complexity. As a management process, planning is about producing 'orderly' results, not about change. *Leadership*, on the other hand, involves *creating a vision* to chart a course for the organization. As part of this process, strategies are developed to initiate and sustain the needed changes to stay focused on the

*Primary
Organizational Tasks*
(John Kotter)

Determine what
work needs to be
done

Form people
networks to do the
work

Ensure that the work
gets done properly

The Right-Hand, Left-Hand of Management and Leadership

Becoming a Holistic Leader

vision. *How* this is done is critical to the success an organization will have in working progressively towards its vision.

Organizing

To reach its goals, management *organizes* and *staffs*. This involves creating an organizational structure, including a set of jobs, that will enable the organization to achieve these goals. Through this process of organizing and staffing, management develops delegation authorities and monitoring systems. It also creates communication plans to ensure that employees understand what is taking place.

The management function, however, needs the opposing hand of leadership to assist it. The equivalent activity is that of *aligning people*. A vitally important activity here is *communication*. One key aspect of this is ensuring that those who understand the vision and are committed to change receive this communication.

Controlling

Management must also ensure that the plan is achieved, and it does this through *controlling and problem-solving*. Monitoring plays a key role here. In contrast, leadership requires that people are *motivated and inspired* to work towards a vision, despite setbacks and unforeseen problems. In addition to the need for senior leaders to create an inclusive vision, a key aspect of leadership is to *unleash the energy* of people in an organization and to *focus* it towards a shared vision.

Bringing it All Together

This review of the distinct yet complementary functions of management and leadership underscores the need to approach both in an integrated way, which is essential to moving along the path towards Holistic Leadership.

As much as those involved in managerial work need to learn how to effectively lead and manage, people in non-management positions must also develop their leadership skills. This is becoming increasingly important because of the challenges that organizations are facing in a world of growing complexity and inter-connected issues. It means that executive leadership needs to refrain from

The Right-Hand, Left-Hand of Management and Leadership

Becoming a Holistic Leader

automatically labeling those in managerial positions as the organization's 'leaders' and everyone else just 'employees.'

For those in non-management positions what does leadership look like? It encompasses the ability to influence not just sideways but upwards; showing initiative, being fully engaged and assuming additional responsibilities to stretch one's learning; and sharing ideas, speaking truth to power and contributing to the organization's vision.

It's vital, therefore, that executive leadership communicates very clearly on how the organization defines leadership. If management wishes to espouse the view that the organization embraces shared leadership, then it's imperative that this is what is actually practiced on a daily basis—that it is engrained in its culture and DNA.

This brings us to Holistic Leadership, the focus of the next five chapters.

5

Holistic Leadership

Preface

This chapter presents Holistic Leadership, a framework that will assist people to reflect, inquire and probe into how they can strengthen their leadership skills. Previously, we looked at the complementary relationship between management and leadership and the linkages to learning. Holistic Leadership, as an integrated model, equips people to operate effectively during periods of rapid organizational and societal change and chaos.

Holistic Leadership is founded upon the premise that each of us must strive throughout our lifetime to become a balanced, centered individual who is able to effectively use the *four principal components of leadership: **teaching, directing, participating and nurturing***. Of particular significance is to understand the importance of the whole and the inter-relationships among the four principal components.

Many people feel that *leadership equals position* in an organization. My approach, however, is to focus on drawing out the leadership that is present in each and every one of us. We all have the potential to take on greater leadership roles in our communities and organizations. However, it's important that any discussion on leadership be integrated with the individual, the team and the organization. Although an effective leader must be able to adjust his style to the circumstances and the people he leads, this must also be done in the larger context of a learning

Holistic Leadership

Becoming a Holistic Leader

culture. And what is a learning culture? To paraphrase Peter Senge³, a learning culture exists when people collaborate to create their own future. This means that leadership must be shared if this is to happen.

Why All the Fuss?

The roles that people play in today's organizations have become much more dynamic. They face greater complexity in their work environments as a result of the evolving and more sophisticated needs of clients; growing interdependency in the global economy; technological change; changing organizational structures and work processes; an aging population; and fiscal pressures. For those in managerial positions, they must not only be able to respond to the needs, values and aspirations of their staff, they must also anticipate changes in the future.

The Four Principal Components of Holistic Leadership:

1. Teaching
2. Directing
3. Participating
4. Nurturing

To help their organizations thrive in a rapidly changing economy and society, *everyone* must practice some form of leadership. Working in a collaborative manner with co-workers is key to helping their organizations succeed in the 21st Century. However, equally important is enhancing one's personal leadership, which requires self-discovery and self-awareness.

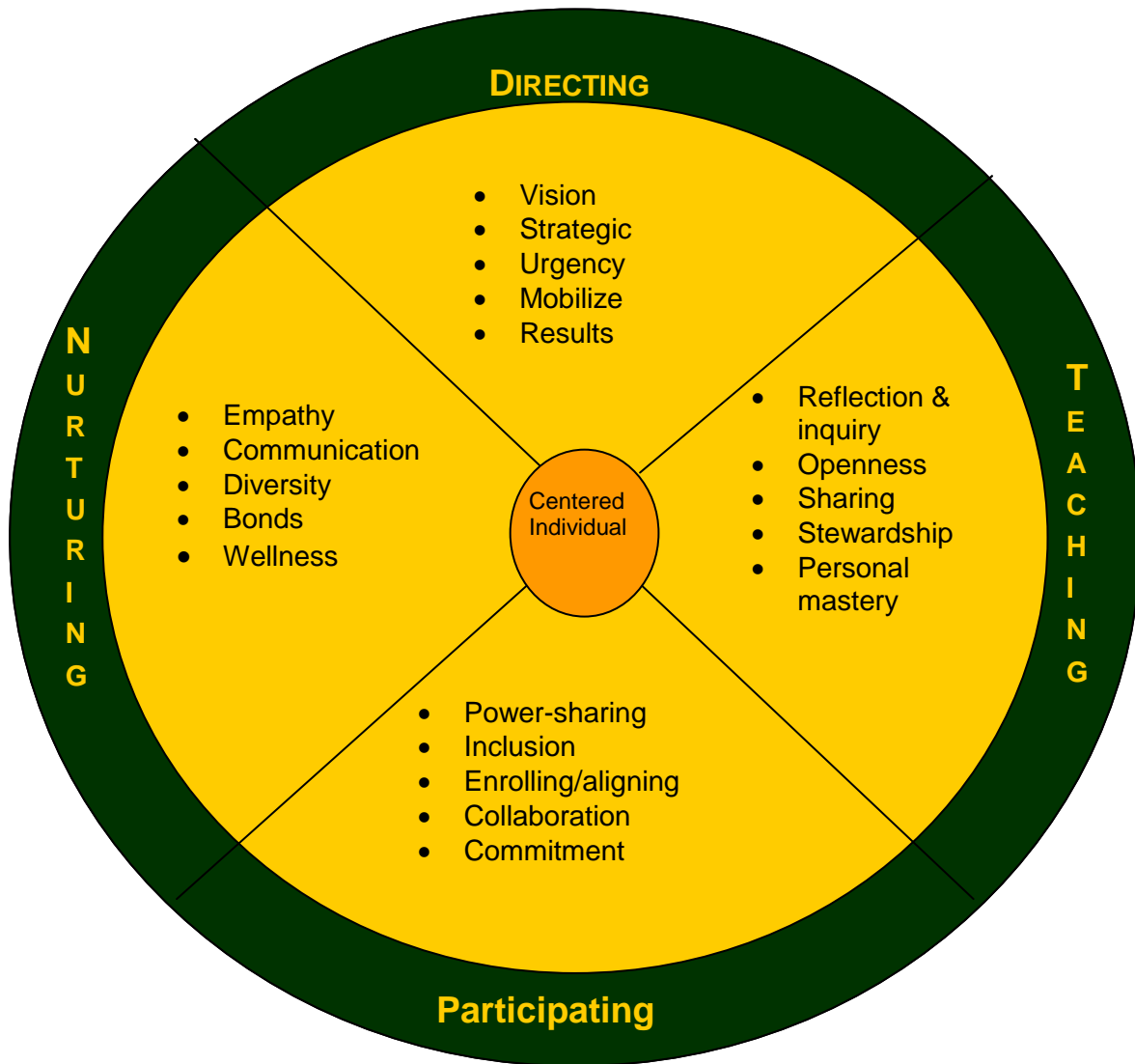
The need has never been greater for leaders at all levels who are capable of functioning effectively in organizations in which diversity and interdependence have become two major yet opposing forces. This requires new behaviors for leaders if they are to succeed in this new and complex environment. Let's now look at how Holistic Leadership operates.

³ <http://www.solonline.org/aboutsol/who/Senge/>

Becoming a Holistic Leader

The Holistic Leader

The Four Principal Components & Enabling Elements



Becoming a Holistic Leader

Holistic Leadership

The above diagram depicts an integrated approach to leadership. At the core is the *Centered Individual*, representing the person who has attained a high level of comfort and competency with the four principal leadership components: **teaching, directing, participating and nurturing.**

One may prefer to see the centered individual as having achieved balance. That's fine, as long as it's understood that balance does not mean using the four components in equal measures. Instead, the centered individual is able to seamlessly alter her leadership behavior to meet the needs of her followers and co-workers under a given set of circumstances.

Each of the four components is supported by four enabling elements, which are described in the following chapters. Although each of these elements plays a unique role in contributing to a leadership component, they need to be viewed as part of an integrated set. For example, the Directing component will be weakened through the absence of a Results orientation.

Because leadership does not exist unless there are followers, it stands to reason that at the core of the issues that demand the attention of leaders is *people*. Holistic Leadership has people as its cornerstone. Moreover, it respects the need for formal, managerial leadership *and* informal, shared leadership. *Both* are needed to support one another in an age of uncertainty, paradox and speed. Let's look at an example of a holistic leader.

The Surgeon

Some years ago I watched a documentary that featured people working in demanding occupations. The one segment that stood out was that of an ER surgeon working in an inner-city hospital. I remember watching the chaos in the emergency room, the gunshot victims, people suffering heart attacks, those with broken limbs, and victims of assault. It was incredible to watch, not because of the carnage and extremely fast pace of the ER, but because of how smoothly the ER

Holistic Leadership

Becoming a Holistic Leader

staff functioned. Everyone knew their respective roles, carrying out their duties flawlessly.

The surgeon was in charge of the ER and I couldn't help but remark how calm he was in the midst of chaos. He never lost his cool, quietly giving instructions on specific treatments and protocols, listening to the information given by his team members, and acknowledging their efforts. When interviewed later by the journalist, the surgeon spoke about the demanding work and pressures on the ER staff and the need for constant learning. But one comment he made has remained with me for years. He said in reply to a question on how could staff work in that setting, "My people look to me for leadership. If I lose it, they lose it."

At the end of his shift the surgeon put on his cap and headed out the door. But was he headed home? No. He was on his way to do volunteer work with inner city children.

Take a moment to reflect on this story before you move on. How does this surgeon's actions represent leadership to you?

In the following four chapters you'll read about each of the four principal leadership components and their enabling elements. At the end of each chapter, I've included one or more vignettes as an illustration of leadership in action. Take time to reflect on each of the leadership components, the vignette and the impact for your own leadership.

6

Teaching

A lot has been written on the need for leaders to be coaches and mentors. This is important to their effectiveness. But *Teaching*, as a Holistic Leadership component, is broader, encompassing the learning-organization concept. Some writers have used the expression *The Teaching Organization* in place of the learning organization.

Teaching in the 21st Century becomes the responsibility of everyone in the organization. It begins from within the individual. This is the quest for personal mastery: to continually strive to improve oneself, and in turn to share with others. In essence, we become stewards for teaching, because it's seen in the organization as highly valued and necessary to its long-term success.

Teaching, as a Holistic Leader, comprises five enabling elements:

- ❖ **Reflection & Inquiry**
- ❖ **Openness**
- ❖ **Sharing**
- ❖ **Stewardship**
- ❖ **Personal Mastery**

To be a teacher means being open, both to self-discovery and to the views and feedback from others. **Reflection and inquiry** are critical if this is to occur, for without them we're not able to slow ourselves sufficiently to explore new meanings and possibilities. *Teaching* is fundamental to effective formal and informal leadership.

Teaching

Becoming a Holistic Leader

Openness is vital to our ability to be creative and innovative. If we're closed to ideas and suggestions from others, how will we ever take the chance to try something different or new? In a turbulent global economy, where work is being distributed around the world and as organizations look over their shoulders at new competitors, each of us needs to be open to new possibilities.

The days of hoarding information and protecting one's organizational turf are long gone. Those who try to cling to these practices won't last long in a globalized world. This is where **Sharing** comes into play. Generation Y, in contrast to Gen X and especially Baby Boomers, is much more adept at sharing information and ideas. We Boomers could learn from those much younger than us.

We live on a shrinking planet, not just in terms of the impact of communications technology but more importantly in how we interact with Mother Earth. **Stewardship** is becoming an increasingly important enabling element of *Teaching* as pressures on our planet grow. Again, Gen Y has something to teach us. This generation (born between 1980 and 1995) has a strong sense of both social and environmental justice.

Each of us is never "there." Regardless of one's occupation or work passion, there is always something new to learn or a way to improve our skills, behavior or how we interact with others. **Personal Mastery** is so important to who we are as human beings. If you take the view that every day brings new learning, possibilities and opportunities, then it's hard not to jump out of bed every morning, eager to tackle challenges.

When I talk about **Teaching** one particular person comes to mind: my Jazz piano teacher, Brian. A master Jazz interpreter and creator of original music (with over a dozen CDs), Brian has played professionally for five decades. Yet he's continually exploring new possibilities, experimenting with voicings, chords and structures. I never know what I'm going to learn during a class. It just happens naturally.

Brian's unique teaching style, combined with his own passion for continually learning and improving his mastery of Jazz piano, has embedded in me that none of us are ever "there."

Teaching

Becoming a Holistic Leader

Let's now look at one incredible leader who's been an inspiration to many and who exemplifies the **Teaching** component of Holistic Leadership.

Singing her Way to Space: Leadership Vignette

Julie Payette was strong in maths and sciences as a student growing up in Montreal. But she also loved to sing, and along the way she learned additional languages to her fluent French and English: Russian, German, Spanish and Italian. That wasn't enough for this strong achiever. She later performed with the Montreal Philharmonic Orchestra and earned her commercial pilot's license. Her biggest accomplishment, however, was becoming the second Canadian woman to fly in space aboard the Space Shuttle.

Payette's hard work to become an electrical and computer engineer and then gaining experience in a variety of locations (e.g., IBM research lab in Zurich) helped position her for entry in 1992 to become an astronaut. She was selected with three other people from a field of 5,330 applicants. Payette first flew on the Space Shuttle Discovery in 1999, and was the first Canadian astronaut to visit the Space Station and to operate the robotic Canadarm. She subsequently became Chief Astronaut with the Canadian Space Agency.

In July 2009, Payette served for two weeks as the flight engineer on the Space Shuttle Endeavour for the STS-127, ISS Assembly Mission to the International Space Station. She now works in Houston as a CAPCOM (Spacecraft Communicator) for NASA's Mission Control Center.

Outside of her work as an astronaut, Payette participates in a motivational program that encourages learning inside and outside of the classroom. She speaks to school children and the public across Canada on a regular basis, with the goal of fostering their own growth as human beings. She acknowledges that it can be challenging trying to convey her message when people look at her with awe. But as she puts it: *"The impression is that we're perfect and we're robots, but that's not the case. We're just people who have the skills and personality to do this job well. Human beings are human beings."*

Teaching

Becoming a Holistic Leader

One vital message she stresses is that while academics is important to personal growth, so too is gaining a variety of experiences that promote creativity and imagination. In fact, she likes to tell the story that when she was going through the selection process, she explained to the panel that her choral singing would help make her an excellent astronaut because it made her a more rounded person.

Reflection Question: *As a leader, how do you perceive your abilities as a Teacher; where are you strong and where do you need to improve?*

7

Directing

This component is critical to those in management positions, especially at the senior level. We read in the management literature how managers must possess certain key elements. They need to be visionary and strategic, yet also have a burning sense of urgency to move forward. Furthermore, they must be results-oriented, and to achieve this means that they must be capable of mobilizing people. **Directing** encompasses five enabling elements:

- ❖ **Vision**
- ❖ **Strategic**
- ❖ **Urgency**
- ❖ **Mobilize**
- ❖ **Results**

That these five enabling elements are essential for effective formal leadership is not in dispute. But what about middle managers and employees? Little has been written on the need for people at the middle and lower levels in organizations to develop their skills for these five elements. However, they are critical skills to acquire if we wish to see a change in the culture of leadership in organizations.

There are three main types of leaders in organizations: senior managers, front-line managers and supervisors, and network leaders, or who are also called thought leaders. Network leaders comprise people at all levels, and are typically those working in non-managerial positions. They self-initiate, working across organizational boundaries, sharing information and linking people together.

Directing

Becoming a Holistic Leader

All three categories of leaders must interact because they each possess certain strengths. Unfortunately, front-line managers have not been given sufficient attention with regard to improving their leadership abilities. In terms of Holistic Leadership, front-line managers need to ensure they develop the **Directing** component, because they're the ones who are best positioned to mobilize their staff. They sit on the interface between senior management and staff, and tend to have a grasp of the big picture. This means they also need to be visionary and strategic, as well as results-oriented.

Network leaders are the seed planters, sowing ideas in their organizations and bringing people together. They work typically in non-management positions. Their interaction with front-line managers is vital, in terms of reciprocal sharing of knowledge and ideas. They also play a key role in influencing senior management. Network leaders need to ensure they develop the elements contained in the **Directing** component if they wish to increase their effectiveness.

Consequently, it's important that we rethink our assumptions on the **Directing** component of leadership. These assumptions are oriented around power and authority and who possesses them in organizations. If we really wish to see our organizations evolve to embrace collaborative learning and shared leadership, then we need to shed some of our traditional beliefs on leadership.

Take a moment to read about an incredible corporate leader who portrays the **Directing** component extremely well.

Meet the World's Greenest CEO: Leadership Vignette

Ray Anderson grew up in Georgia during the end of the Great Depression and World War II. After graduating from college he worked for almost 20 years in industry. Then in 1973 he took the plunge, leaving his employer to form Interface, drawing on an idea, his life savings and funds from a few investors.

Directing

Becoming a Holistic Leader

Today, Atlanta-based Interface Inc.⁴ is one of the world's largest flooring companies, with plants in the United States, Canada, England and Australia. However, the company's growth and evolution has been far from ordinary. For example, in 1994 Anderson took a gamble and initiated a process to transform the company using nature as the model.⁵

His QUEST process (Quality Utilizing Employee Suggestions and Teamwork) focused on eliminating waste from cost and measuring workers against perfection. For example, it was found that 10% of each sales dollar went to waste. Between 1994 and 2004, Interface calculated that the elimination of waste represented 28% of its operating income. And from 1996 (his baseline year) to 2008 Interface cut its greenhouse emissions by 71 % in absolute tons! Yet sales increased 66% and earnings doubled. Anderson has more than amply demonstrated that business can make money while reducing its carbon imprint on the planet.

Anderson and his management team were inspired earlier on by Janine Benyus's⁶ book *Biomimicry*. In fact, the manager of product development was so moved that he took his design team deep into the forest to study nature to determine how floor covering could be produced using nature's design principles. The outcome was new flooring, which when installed has virtually no waste since cut pieces are reintegrated into the production process.

"Everything stays in the flow, the material loop. All of that is basically emulating nature in an industrial system, and that remains our goal," asserts Anderson. One of Interface's measures is carbon intensity, the amount of petroleum removed from the earth and then processed through the supply chain to yield one dollar of revenue. The company's carbon intensity fell by one third over nine years, and it closed 39% of its smokestacks and 55% of its effluent pipes.

⁴ <http://www.interfaceglobal.com/>

⁵ Anderson has just released a new book: *Confessions of a Radical Industrialist: Profits, People, Purpose-Doing Business by Respecting the Earth* (2009).

⁶ <http://www.janinebenyus.com/>

Becoming a Holistic Leader

Anderson refers to climbing Mount Sustainability in Interface's pursuit of sustainability. Understanding how to climb each of the seven "faces"⁷ to the peak will yield a zero environmental footprint. His vision is called Mission Zero, referring to Interface achieving a zero carbon footprint by 2020.

What makes Anderson such an intriguing person and exceptional leader is that he's on a never-ending quest to reduce waste and to cut emissions in order to reach a zero carbon footprint. Although employees are proud of their collective achievements, Anderson has had to work diligently at transforming the company's corporate culture and ensuring that *all* employees share his vision. Despite low staff turnover, it's an ongoing process to ensure that the company's values remain engrained in everyone, and that new employees are quickly brought into the fold.

Ray Anderson exemplifies what it means to practice stewardship and to be a true leader in enrolling and aligning his employees towards a common purpose and shared vision. He sets, and is, the benchmark to which executive leaders should aspire.

Reflection Question: *Whether you're a senior executive, middle manager, thought leader or an aspiring leader, how do you influence others? Do you have a personal vision?*

⁷ Eliminate waste, benign emissions, renewable energy, redesign processes and products, resource-efficient transportation, sensitize stakeholders, and redesign the business model.

8

Participating

This brings us to the participatory aspect of leadership. It doesn't matter what expression is used: shared leadership, participatory leadership, post-heroic leadership or roving leadership. The point is that this component of Holistic Leadership is critical to helping organizations create learning cultures that are based on the five enabling elements:

- ❖ **Power-sharing**
- ❖ **Inclusion**
- ❖ **Enrolling/Aligning**
- ❖ **Collaboration**
- ❖ **Commitment**

Much has been written on participatory leadership. In both the private and public sectors, it's often espoused by senior management as how people should work together. However, what's said publicly is often not practiced. This applies not just to management but staff as well.

Modeling the desired behaviors that accompany this form of leadership is fundamental to its eventual success. Network leaders, for example, must practice the enabling elements contained in this Holistic Leadership component. As staff, these leaders need to learn how to collaborate and how to find common ground when conflict arises. People need to take ownership of their actions and not necessarily expect management to come riding to the rescue whenever conflict among staff members breaks out.

Some time ago, I read an article that talked about the tacit collusion in which employees frequently engage to protect their functional boundaries. People

Participating

Becoming a Holistic Leader

follow unspoken norms with respect to staying out of one another's jobs. When these norms are not followed, conflict typically emerges. The consequence is the cementing of behaviors and practices in organizations. When a major change initiative is introduced, senior management becomes frustrated by the rigid silos that have been erected among functional groups, and which in turn contribute to resistance to the change effort.

Participating is an important component of Holistic Leadership because it provides the conduit to unleashing the potential of people. Again, this is important to those in senior and front-line managerial positions, and also to those who seek to play informal leadership roles.

For an example of a corporate leader who excels at **Participating** read the following leadership vignette.

From Milking Machines to Power Tools and Lumber

When she was a little girl growing up in Nova Scotia, Canada, Annette Verschuren went to school in a two-room schoolhouse and helped out on the family's farm. But when her father died when she was only eleven years old, Annette had to carry even greater responsibilities working in the barn, lugging heavy milking machines on the concrete floor until her arches dropped. During her teenage years she contended with four kidney surgeries, but also won the milking competition for seven consecutive years at the Cape Breton County Farmer's Exhibition.

Fast forward a couple of decades after earning a MBA. Today, Verschuren is the Division President of Home Depot Canada, with additional responsibilities for building the company's presence in China. She's not one to cloister herself in head office; instead you'll often see her visiting Home Depot stores, showing up in jeans, baseball cap and untucked shirt. She's quick to establish a rapport with store employees, not just talking business but also showing an interest in them and having a few laughs.

Participating

Becoming a Holistic Leader

After helping U.S.-based crafts chain Michael's expand into Canada, opening 17 stores in only just over two years, Verschuren moved to Home Depot in 1996. Since then she has been nothing short of a human dynamo. Home Depot's number of Canadian stores exploded from a mere 19 to currently 154. And all from a 39 year-old woman who knew nothing about the lumber and hardware business.

Despite these achievements, Verschuren understands well the competitive climate of her industry. A case in point is the recent entry into Canada by U.S. hardware powerhouse Lowe, not to mention already competing against Quebec-based chain Rona. And then there's the ongoing weak economy in North America with which to contend. However, her intent is to open more stores in Canada.

On top of these challenges is Home Depot's entrance into China. While holding much opportunity it will not be easy. Verschuren's ability to innovate, such as she did with Home Depot Canada (e.g., tailoring stores to attract more women), is an important strength for the China market. In fact, she's a proponent of encouraging an entrepreneurial approach at the store level.

As a leader Verschuren's no pushover. As much as she's charismatic, she possesses a keen business sense and has the uncanny ability to adjust her personality to meet the circumstances. She becomes the down-home girl when meeting employees, roughs it up with tradespeople, and then dons the business suit and accompanying speech when dealing with other business people. She's also the vice-chair of the Canadian Council of Chief Executives.

Outsiders who admire Annette Verschuren as a corporate leader also say that they wouldn't want to work directly for her. Her strong work ethic, fast pace, demanding style and 'take-no-prisoners' approach represents a leadership style not for the faint of heart. However, one has only to look at her impressive results in just over a decade to realize that this female corporate leader is as tough and smart as they come. And she's achieved this through the five enabling elements of **Participating**.

For a different example on the **Participating** component of Holistic Leadership, read the following vignette and the ultimate sacrifice it involved.

Participating

Becoming a Holistic Leader

Pat Tillman – Unselfish Service

Pat Tillman began his football career as a linebacker at Arizona State University in 1994, and by his senior year was voted best defensive player. He was also a strong business student, and in 1998 had been recruited by the Arizona Cardinals. Early on in his NFL career, he refused a highly lucrative offer from the St. Louis Rams because of his loyalty to the Cardinals.

Despite his solid performance in the NFL, he declined a three and a half million dollar contract offer from the Cardinals to join the U.S. Army. Why? Because his country had just been attacked by al-Qaeda and he felt duty-bound to serve. He and his brother joined the Rangers in 2002, and they completed the program after the first invasion of Operation Iraqi Freedom. He was later deployed to Afghanistan, where he was killed by friendly fire during a firefight. The subsequent cover-up was finally revealed, to a degree, and a U.S. Congressional investigation continues in the details surrounding his death.

Tillman was known to be well-read on a variety of topics by many authors. After the invasion of Iraq he became critical of that effort and had openly expressed his views. He had planned to pursue exploring that issue upon his return to America after his Afghanistan tour was completed.

Pat Tillman didn't have to enlist in the U.S. Army—there was no draft at that time—but he did it out of unselfish service to his country. The road was paved to a highly lucrative professional football career, but he put that aside for what he saw as a higher calling.

Reflection Question: *How do you share your leadership within your team and more broadly within your organization?*

Participating

9

Nurturing

The ability to nurture is an important part of leadership, yet it is only beginning to receive the attention it deserves. To become a Holistic Leadership, however, **Nurturing** is absolutely essential. Its five enabling elements are tightly interwoven:

- ❖ **Empathy**
- ❖ **Communication**
- ❖ **Diversity**
- ❖ **Bonds**
- ❖ **Wellness**

Unfortunately the idea of leaders, whether male or female, embracing a nurturing mindset is alien to many people. It's a female role, not a male one, many would argue. But is it in reality?

It's time to get over old, worn-out stereotypes of authoritarian leadership, where people are told what to do, how to think and how to act. This has no place in 21st Century organizations, not with the rapidity of change. People can't be forced to be creative or to innovate.

Some people would call **Nurturing**, as part of Holistic Leadership, the really soft stuff. Because it's strongly oriented around relationships and the human dimension, **Nurturing** is not easily quantifiable. Moreover, it is an area that has not traditionally been part of the heroic leadership mindset, which has been dominated by males.

Nurturing

Becoming a Holistic Leader

The ability to show **empathy** is vital to enhancing our leadership. To be empathetic means to be able to put oneself in another's shoes, or frame of reference. Stephen Covey, in his book *The 7 Habits of Highly Effective People*, speaks of the habit of *Seek first to understand, then be understood*. This is a difficult habit to learn because it requires us to listen carefully to the other person and to really understand their point of view, all the while refraining from speaking ourselves. If we wish to be understood, we must first understand from where the other person is coming.

Improving our ability to empathize will in turn enhance our communication skills. Creating meaningful conversations, or dialogues, is essential if organizations are to enhance their collective ability to learn. But the challenge to this is the diversity that is growing in organizations. The Holistic Leader is able to see the value in diverse needs, wants, beliefs, expectations, personalities, backgrounds, gender, color and age. Being able to see from a systems perspective the benefits that diversity brings to an organization, and in turn influencing it in a forward-thinking way, is a strong leadership asset.

This leads to the creation of **bonds** within the organization. The Holistic Leader has contributed to creating a web of relationships, despite the challenge of addressing diversity in an organization that faces unrelenting change. These bonds, in turn, support collaborative learning and the creation of a learning culture.

The Holistic Leader understands and pays attention to the need for developing the triangle of *spirit, mind, and body*. Without daily practice of these three equally important parts, it's difficult to achieve and maintain a high state of personal **wellness**. As with personal mastery, personal wellness starts from within. But the Holistic Leader also strives to help her co-workers (and followers) increase their awareness of this important element of nurturing leadership. For example, the network leader sows "wellness seeds" in the organization as a way to assist the organization create a healthier workplace: spiritually, intellectually, and physically.

The following two leadership vignettes provide contrasting examples of **Nurturing** Holistic Leadership.

Nurturing

Sounds into Syllables: Leadership Vignette

I've emphasized that leadership resides at all levels of organizations and communities. I would also add that it's not specific to only certain age groups. Many young people, including teenagers, have done exceptional things for their communities and society. Kayla Cornale received a Gold Medal for Health Sciences at the 2006 Canada Wide Science Fair. At the time Kayla was a grade 11 student in Burlington, Ontario. Her project was entitled *Sounds into Syllables: Windows to the World of Childhood Autism*.

As a high school student Kayla wanted to have a closer relationship with her cousin, Lorena. However, due to Lorena's autism this proved very difficult. As she watched Lorena memorize songs, something she excelled at, Kayla got the idea to use the piano as the medium for communication. By assigning letters of the alphabet to the middle keys in the form of chords, Kayla then connected them to language. The result was a trademarked patent viewed as a major breakthrough in autism research.

Kayla's *Sounds into Syllables* method is used in a number of school districts around the Province of Ontario, and she was later recognized by CNN's Heroes' Award in November 2007. In fact, she was the only Canadian finalist among 7,000 people nominated by viewers in 80 countries, and one of the three finalists in the Young Wonders category for people under 18.

Kayla received a scholarship and now is a science student at Stanford University in California.

Now let's look at another leader from a completely different walk of life, yet who practiced the **Nurturing** component of Holistic Leadership.

Nichola Goddard—Peacemaker

Captain Goddard was the first female Canadian soldier to be killed in combat since the Second World War. Her death occurred on May 17, 2006 during a brutal firefight with the Taliban in the Panjwaye District in Afghanistan. Goddard's role as

Nurturing

Becoming a Holistic Leader

crew commander was to call in artillery fire. This meant being in a forward position during the battle and physically exposing herself. A rocket propelled grenade fired by the Taliban struck her LAV vehicle, exploding on impact and killing her instantly.

Her husband received on Goddard's behalf the Memorial Cross (also known as the Silver Cross).

A strong student and member of the debating club, Captain Goddard received a scholarship to attend Royal Military College in Kingston, Ontario. Despite her fondness for the military, she was also deeply interested in humanitarian issues and how to bring about peace in areas of conflict. Because of imperfect vision she wasn't able to join the Air Force and chose the Army instead. Her strong math skills lead her to specialize in artillery.

Captain Goddard was highly regarded by her peers, and remembered for her vivaciousness, kindness and listening skills. Serving her country was more than just about being a soldier and learning technical skills, but about leadership and how to make the world a better place.

Pause to Reflect: A Few Questions for You

Before you move on to the next chapter, please pause and reflect on what you have just read in the preceding five chapters.

Where do you see the intersections among the four Holistic Leadership components?

What would happen if you decided to concentrate your efforts where you're already strong, ignoring a weaker component?

What would be the impact on developing a followership?

What do you see as some of the common threads between the leadership vignettes in each of the previous chapters?

Nurturing

Becoming a Holistic Leader

I would offer, for example, that one common thread was the desire of these leaders to communicate with other people. A second thread was the tendency to put the group's welfare before their own.

- *When you read the profiles, was there a particular leader with whom you closely identified?*
- *What was your major learning or a-ha moment?*
- *Where could you focus your own efforts to expand your personal leadership?*

10

10 Valuable Lessons for Aspiring Holistic Leaders

You've just read as part of my explaining Holistic Leadership a series of stories about incredible people who have displayed their own personal brand of leadership. Although they were from different walks of life and worked in very different settings, one trait that comes through is that they were all courageous in how they persevered and remained focused on their beliefs.

In this chapter, I wish to share 10 lessons that I've drawn from my own leadership journey over the past two decades. In addition to learning a great deal through work experience, formal education and training, and ongoing reading and networking with like-minded people, many of my most powerful discoveries occurred earlier on in my career when I became a new manager. We like to talk about learning experiences, but mine were especially jarring as a young manager. But I picked myself up, dusted myself off and continued on. It's all about learning through trial and error.

The following lessons are not aimed at just those who wish to move into managerial positions; they're also for those who work as project managers, team leaders, thought leaders, networkers and relationship builders. Of particular importance is that those holding senior positions in organizations should reflect on these lessons. It's important to remember that management is an appointment of position; leadership is earned. If you have no willing followers, then you're not a leader. You may rule through dictatorship and compliance as a manager, but to have a true followership means enrolling others in your vision.

1. **Create and nurture a learning environment.** This is where people will develop the skills and competencies that will become their toolbox for life.

Becoming a Holistic Leader

Don't expect traditional loyalty to the organization. As a leader, your job is to bring out the best in people and to maximize their creativity, productivity and output.

2. **Constantly walk the talk.** Don't be a cave dweller, hiding out in your cubicle or behind a closed door. And don't just be physically visible but be *present* in body, mind and spirit. Oh, and please park the *Blackberry*!
3. **Dare to care.** Show that you *really* care about the people you lead and with whom you work. Don't nickel-and-dime people on their work hours. If you set the right tone and climate in the workplace, you'll see an impressive increase in employee engagement, creativity and accomplishment.
4. **Develop an effective rumour meter.** Learn to distil fact from fiction, truth from hype. By avoiding getting swayed by organizational manipulators and by sticking to your values, people will respect you all the more.
5. **Realize that organizational cultural change is *not* a check-the-box exercise.** It's about people engagement and relationships. It takes time and patience—plenty of the latter.
6. **Link training and learning to job performance when it's needed.** It's also necessary to take the long view: investing in people for the long-term demonstrates your commitment to them.
7. **Be honest when you ask for feedback.** This applies whether it's peer-to-peer or employee to manager. When people are brought together at workshops, conferences and town-halls to generate ideas and recommendations for senior management, only to then ignore these ideas, is the ultimate act of disrespect. Honor and value people's contributions.
8. **Focus on results.** Let people figure out how to do their work. Coach, but don't smother. Micro-management is for the insecure, and something to avoid at all costs.

Becoming a Holistic Leader

9. **Share the leadership.** Step back when you realize you're not the best one to lead at the moment, regardless of how high you are in the hierarchy. Let go of your ego.

10. **As a leader you're a change agent.** Be open to outcome, not attached to it. Learn to love the unknown and the opportunities and challenges it presents. Know fear: respect it, value it, transcend it.

Reflect on these lessons to determine which ones really speak to you. Are there one or two lessons that you want to focus on immediately?

Also take the time to create your own Holistic Leadership lessons, and be sure to share them with others. Pay it forward.

11

Finding Your Own Voice

To evolve from working in a compliance mindset to one where you self-empower is clearly not an easy task. It's a long process; I speak from experience. Some people will tolerate the "system," some will push back, while others will depart for other ventures.

As I stated earlier the ten guiding principles are my own creation. What's important is for you to reflect on them and to make them your own. For example, find people around you who are leading in non-formal management positions but who are engaging others and achieving great results. Observe them and find out their story. Ask them to mentor you.

The Holistic Leadership Model is simple in design yet complex in practice. It's a never-ending journey to achieve the right balance among the four principal components and their enabling elements.

The components of the Holistic Leader are not discrete but rather interdependent. When looking at one part, it quickly becomes apparent of the link to the others. And this is how we need to approach leadership *and* management: by understanding the web of relationships among the many parts. If we take the approach that the whole is greater than the sum of the parts, then we will benefit from the synergies that emerge when we work towards becoming Holistic Leaders.


Finding Your Own Voice



In looking at the Holistic Leadership Model, determine where you're strongest: **directing, participating, nurturing or teaching**. Work on those enabling elements where you feel you're weakest and where you can benefit the most.

I encourage you to go through the questions for reflection and inquiry contained in the Appendices. Take your time. Bringing these questions into your own reality will help you create strategies for effective action in the months ahead.

To embrace and practice shared leadership and shared responsibility means doing things differently—in a significant way. By following the principles presented in this book and by adopting Holistic Leadership as your personal philosophy, you will set yourself on the path towards self-discovery and enlightenment. And to help get you get started, I invite you to take a walk in the woods with Max and me to release your creativity and to find your own voice.



***The journey in between
what you once were and
who you are now becoming
is where the dance of life
really takes place.***

Barbara De Angelis

About the Author



Jim Taggart is a leadership and organizational learning consultant, offering services to business executives and managers who wish to enhance their effectiveness as leaders. With more than 30 years of personal leadership experience, Jim's knowledge combined with his results-oriented approach will help move your organization to the next level.

Jim worked for three decades with the Government of Canada. His career spanned labor market forecasting and analysis, innovation and competitiveness policy development, and leadership development and organizational learning project management.

A recognized thought leader, Jim maintains a website and blog on leadership and management issues. He holds a Master's degree in economics from the University of New Brunswick and a Masters degree in Leadership and Organizational Learning from Royal Roads University.

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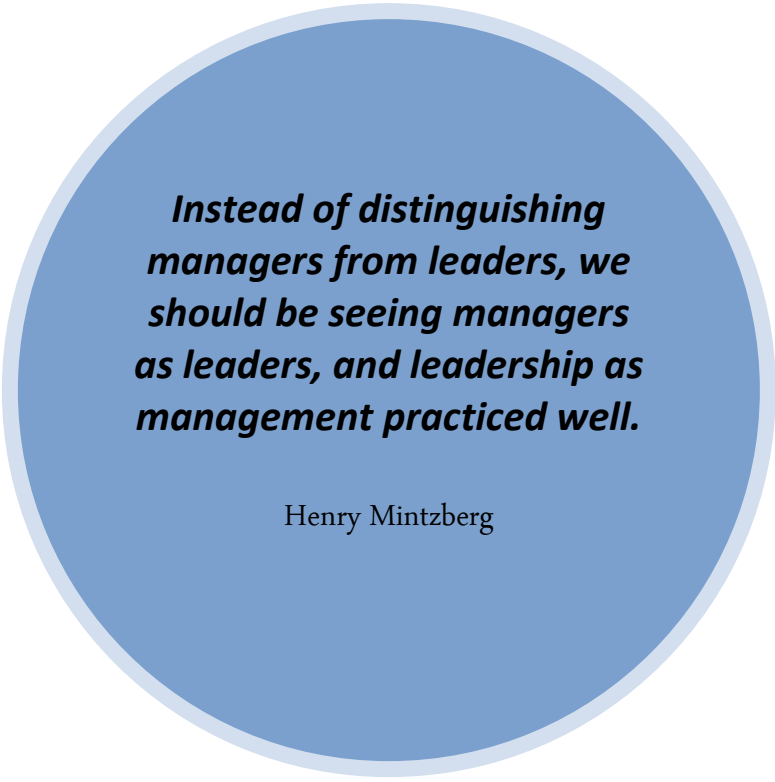
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***Instead of distinguishing
managers from leaders, we
should be seeing managers
as leaders, and leadership as
management practiced well.***

Henry Mintzberg

Appendices

Questions for Reflection and Inquiry

What can I do?
How can I do it?
Can I make a difference?

1) What I offer to my organization, my community and society are:

2) My unique gifts are:

3) As a leader in my own right, I offer:

Becoming a Holistic Leader

4) In regard to Holistic Leadership and its four principal components, the one that I need to concentrate first on is:

5) Of the five elements in that component, the one(s) that I am going to address first is (are):

6) The assumptions I hold regarding leadership are:

Becoming a Holistic Leader

7) To be more authentic in my leadership, I need to:

8) I want to _____

but am unable to because

However, I will take the action of _____

to reach this goal.

10 Ways to Earn Respect as a Leader in the Workplace

The following ten ways for gaining respect from your co-workers and those you lead is not the definitive list, but one drawn from my personal experiences. Adhering to them will set you on the right path to excellence in leadership, but always keep in mind that this is a never-ending process of self-enlightenment and personal growth.

1. **Get to know your co-workers and their families.** This doesn't mean snooping or putting on a false interest, but instead showing genuine interest in those you lead.
2. **It's okay to change your mind.** If you change direction, make sure that you explain clearly to your team why you did so. It's also advisable to involve your team in setting direction, as well as when it needs to be altered.
3. **Communicate clearly and regularly.** Ensure that your team is up to date on what is going on in the organization. The best way to do this is face-to-face. Make judicious use of email.
4. **Encourage a learning culture within your team.** Show leadership by starting with yourself. Lifelong learning is not a 9 to 5 proposition; it's about how you absorb new experiences at work and through community service, training courses, assignments, reading, travel, etc. It's a reciprocal process: employers provide opportunities to learn and grow, but employees also need to engage in activities outside of work.
5. **Maintain a careful balance between work and socializing.** As much as it's good to do some outside socializing with your team, take particular care as a manager to never be seen as creating favorites, which can occur through social activities.
6. **Give regular feedback on performance.** Be open and honest. Don't whitewash performance reviews; this doesn't help anyone and deludes

Becoming a Holistic Leader

people (especially newer recruits) into believing that they're doing a good job. But acknowledge and recognize superior performance. And be sure to link performance reviews to learning activities. Performance and learning go hand-in-hand.

7. **Make generous use of self-deprecating humor.** NEVER make fun of others at their expense. This shows your own insecurity. And don't tolerate others making fun of those who may be more vulnerable. Lead by example.
8. **Share the leadership.** Avoid micromanaging your staff. As they gain work experience and grow, keep the tension on by giving more responsibility and leadership opportunities. As manager, park your ego.
9. **Admit when you screw up.** Make a point of showing how you've learned from the mistake. This is a powerful way to demonstrate your leadership to your team and to underscore that you're not above them—you're a human being.
10. **Stand behind your staff during times of difficulty.** When your staff make mistakes or get caught up in organizational politics and are in trouble, don't abandon them in an attempt to cover your own ass. If you can't stand behind one of your team members, then you don't belong in management and you're certainly *not* a leader.

What can you add to this list?

Becoming a Holistic Leader

Recommended Leadership Books

Choosing a recommended list of books on leadership is not an easy task, considering the large volume of books out there. However, the following list offers an excellent start for people interested in enhancing their knowledge of the field.

I have included Peter Senge's book *The Fifth Discipline* because of its vital importance to transforming organizations. When his book was released in 1990, it was said to be the seminal management book of the 20th century. I highly recommend reading it.

Block, Peter. *Stewardship: Choosing Service Over Self-Interest*. San Francisco: Berrett-Koehler, 1993.

Bradford, David L. and Cohen, Allan R. *Power Up: Transforming Organizations Through Shared Leadership*. New York: John Wiley & Sons, 1998.

Burns, James MacGregor. *Leadership*. New York: Harper Row, 1978.

Gardner, John. *On Leadership*. New York: The Free Press, 1990.

Helgesen, Sally. *The Female Advantage: Women's Ways of Leadership*. New York: Doubleday, 1990.

Kouzes, James M. and Posner, Barry Z. *The Leadership Challenge*, 4th Ed. San Francisco: Jossey-Bass, 2007.

Katzenbach, Jon R. and Smith, Douglas K. *The Discipline of Teams*. New York: John Wiley & Sons, 2001.

Becoming a Holistic Leader

Mintzberg, Henry. *Managing*. San Francisco: Berrett-Koehler, 2009.

Parker-Follett, Mary. *Prophet of Management: A Celebration of Writings from the 1920s*, Boston: Harvard Business School Press, 1995.

Senge, Peter. *The Fifth Discipline: The Art and Practice of the Learning Organization*. New York: Doubleday/Currency, 1990.

Wheatley, Margaret J. *Leadership and the New Science*. San Francisco: Berrett-Koehler, 1992.

There are many more excellent books on management and leadership; I encourage you to explore them. The above books are not only excellent but they may also be considered to be core leadership books. They will give you many years of timeless perspectives and ideas.

Becoming a Holistic Leader

Website Resources

The following websites and blogs offer a wealth of information and perspectives on leadership; a few offer memberships. ILA and SOL are both excellent organizations to join.

Bret L. Simmons: Positive Organizational Behavior

<http://www.bretlsimmons.com/>

Bret's regular blog posts cover a wide range of topics on leadership issues.

Business Exchange: Management Ideas

<http://bx.businessweek.com/management-ideas/reference/>

Terrific source for information on business and management-related issues.

Capture Your Flag: Interviewing Tomorrow's Leaders...Today

<http://www.captureyourflag.com/>

An eclectic array of interviews with leaders around the world.

Center for Creative Leadership

<http://www.ccl.org/leadership/index.aspx>

Look under the Research & Faculty tab for free papers and reports.

HR World: The Top 100 Management and Leadership Blogs

<http://www.hrworld.com/features/top-100-management-blogs-061008/index.php>

Organized around diverse themes relating to organizational issues.

Integral Coaching Canada

<http://www.integralcoachingcanada.com/home.php>

Contains excellent articles on coaching (look under the Resources tab).

International Leadership Association

<http://www.ila-net.org/>

If you're looking to join an excellent network with supportive people, this is it.

Becoming a Holistic Leader

Managing Leadership: The Strategic Role of the Senior Executive

<http://managingleadership.com/>

Excellent blog posts on corporate leadership issues, including book reviews.

Paracomm Partners International: Coaching

<http://www.paracomm.com/index.html>

Provides excellent articles on coaching.

Infed.org: Leadership Models

<http://www.infed.org/leadership/>

Includes a variety of excellent essays on shared leadership and learning.

Society for Organizational Learning

<http://www.solonline.org/>

Founded by Peter Senge. Look under the Publications tab, then click the Library link for free articles.

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I find the question “Why are we here?” typically human. I’d suggest “Are we here?” would be the more logical choice.

Mr. Spock, Star Trek

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