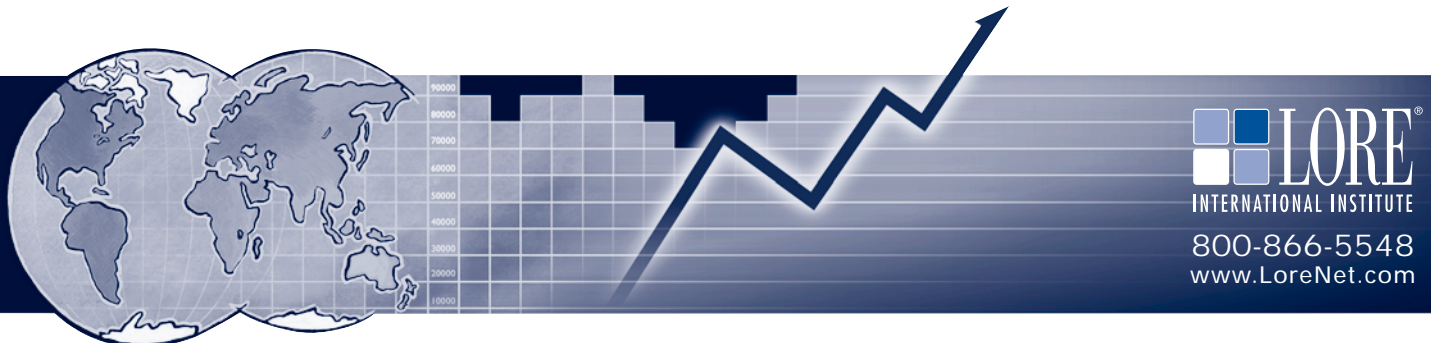


THE
White Paper
S E R I E S

PRESENTED BY LORE INTERNATIONAL INSTITUTE

**VELOCITY AND VITALITY:
DESIGNING A LIFE THAT SUSTAINS
EXTRAORDINARY PERFORMANCE**

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A burglar creeps through a house in the dark of night. He thinks no one is home, but then a voice says, “God is watching you.”

Alarmed, he stops dead in his tracks and waits. It’s too dark to see who is in the room with him, and he begins to panic. “What did you say?” he almost whispers.

“God is watching you.”

It wasn’t his imagination. Someone is definitely there. Trying to figure a way out of this predicament, he sees the shape of a lamp just off to his right. Inching over, he feels for the switch. When the lamp comes on, he is relieved to see a parrot in a cage on the other side of the room. “Was that you?” he says.

“God is watching you,” the parrot says again.

Now smiling, the fear melting away, he walks over to the cage and stares at the parrot. “You scared the hell out of me,” he says. “Since you’re watching me, I suppose that makes you god.”

“No, I’m not god,” the parrot replies. “I’m just a parrot. God is that ninety-pound rottweiler behind you.”

In their book *Blur: the speed of change in the connected economy*, Stan Davis and Christopher Meyer argue that we are experiencing an unprecedented moment in history when speed, connectivity, and intangibility are creating a blur that is well beyond most people’s comfort zone.

Business and life are changing so rapidly that what was current two years ago is passé today. You can barely master the information you need and the skills you must possess before they are no longer adequate. Instant obsolescence doesn’t just apply to products; it applies to the competencies we need to do our work in this globally connected, rapidly changing, fast-paced, driven, driven, driven world.

“Don’t think you’ll ever slow down blur,” Davis and Meyer warn. “Let alone bring it to a halt. Its constant acceleration is here to stay, and those who miss that point will miss everything. Your job as a manager, as an entrepreneur, as a consumer, and as an individual is to master the blur, to keep the acceleration going, to keep your world changing and off balance. Stop trying to slow it down. Stop trying to clarify it, codify it, explain it. Recognize it. Learn its new rules. You’ll then be able to move at blur’s speed—and discover that you can thrive in amazing new ways.”¹

Moving at blur’s speed. Okay, sounds good, sounds hip, sounds energizing, but at what cost? Moving at light’s speed is taking a heavy toll on a large number of us, our families, and our businesses. Like that hapless burglar, in today’s high-velocity workplace, many of us have ninety-pound rottweilers lurking in the dark behind us. And that rottweiler takes the form of epidemic levels of diabetes and obesity, hypertension, heart attacks, ailing marriages, broken relationships with our children, alcoholism, drug dependency, and disease, on the one hand, and poor leadership, high turnover, lost sales, and less than adequate work performance, on the other.

¹ Stan Davis and Christopher Meyer, *Blur: the speed of change in the connected economy* (NY: Warner Books, 1998), pp. 7-8.

As troubling but less obvious is an epidemic of *presenteeism*² —a popular term now for being at work but being exhausted, overworked, distracted, and disengaged—in short, being absent while being present. How many times have you been physically present at a meeting but mentally checked out? How often has your mind wandered while on a call with a customer? How many times during a week do you have trouble staying awake while performing a mundane task at work? What mistakes have you made while on the phone and checking your e-mail or Blackberry at the same time?

If you ask a hundred of today's high performers what they want most in their lives, the majority of them will say they want more balance—that elusive mix of personal and professional happiness and productivity. In fact, many companies promote work/life balance programs that are often counterintuitive to the true underlying culture of higher output and a healthier balance sheet. We once coached a fast tracker who recognized that his marriage was in trouble. He was devoting most of his time to the job and was justly proud of being the youngest office manager in the fast-growing region of his firm, but he was afraid of losing his young wife and two children, whom he rarely spent time with.

"I really want to spend more time with my family," this young man said.

"Then why don't you?" the coach asked.

"Because I'm so busy at work," he said. "Because we're understaffed, and I don't have enough people I can trust to do the work well by themselves, and because my clients are demanding more and more, and because we just introduced five new products and have to work out the bugs, and because. . . ."

Yada yada yada. You know the drill. Let's be honest with ourselves. We want balance in our lives but we also want the success—and success can be a demanding master. In many of these situations, true balance or the fully integrated life is an illusion.

In our thousands of coaching engagements over the years, we've found that this is particularly the case with senior executives, many of whom have told us that they had extreme regret about serving the work master at the expense of health, family, and relationships. In their minds, they must make a Faustian bargain—selling their souls, as it were, for the success they crave. So they work hard to sustain high performance at work but must trade off happiness and fulfillment in the rest of their lives. The corollary is that by not sustaining their personal vitality, their work performance eventually suffers and they burn out, give up, derail, or otherwise suffer the train wreck of their lives when it may be too late to save it. A growing percentage of executives suffer cataclysmic health events—heart attacks and strokes that can even take away their lives.

We live in a competitive, high-velocity world. In the blur, we often don't take time to stop and smell the roses. We don't even know the roses are there.

And then there's that ninety-pound rottweiler creeping up behind us, and he often bites us in the rear before we even know he is there. Just ask the legions of executives who have gained too much weight, taken too many medications, suffered too much stress, failed to look out for themselves, and

² presenteeism (prez.un.TEE.iz.um) n. The feeling that one must show up for work even if one is too sick, stressed, or distracted to be productive; the feeling that one needs to work extra hours even if one has no extra work to do. Source: <http://www.wordspy.com/words>

gained a pension but lost their spouses, their children, and, in the most unfortunate cases, their lives. Consider Jim Cantalupo, the CEO of McDonald's corporation, who died suddenly of a heart attack while at a company convention in April 2004. Cantalupo was widely credited with leading a successful turnaround in quality, service, and sales at the world's largest fast-food retailer, and his journey ended at the relatively young age of 60.

The reality of life in business today is that we can't change the velocity by which we are moving. We can only embrace the blur. If you aspire to the fast track, then it's going to be a rapid ride, like it or not. The question is, can you retain your vitality while moving at the speed of light? Anyone with the talent and desire to succeed can work long enough and hard enough to perform well, but can you sustain it, and, if so, for how long and at what cost? Like a child on a merry-go-round striving to grasp the gold ring, if you want the gold ring badly enough, you can probably get it, but can you do so without falling off the horse?

We believe you can—but not without being thoughtful about how you manage your life and your work and not without some changes. The good news is that those who are highly motivated to execute at work have the wiring and capability to do the same thing with their personal health and mental well-being. It is possible to sustain your work performance and your life, to achieve both velocity and vitality, if you attend to the right things. These things can be integrated into your current lifestyle, right now. They don't involve dramatic lifestyle makeovers, or countless hours spent in gyms, the "fad diet of the moment," or highly valued brainpower spent figuring out how to improve your vitality.

It is possible to be vital and healthy, to be a balanced person, a good partner, an inspiring leader, and a strong performer if you look after yourself in mind, body, and spirit, and that's what this paper is about. We will integrate what we know about human performance to business and examine not only the health and wellness aspects of velocity and vitality but the leadership and performance aspects associated with peak health and output. We believe there is a very linear connection between human performance and business performance, and we will show how sustaining vitality in your life can help you sustain exceptional work performance even in the blur.

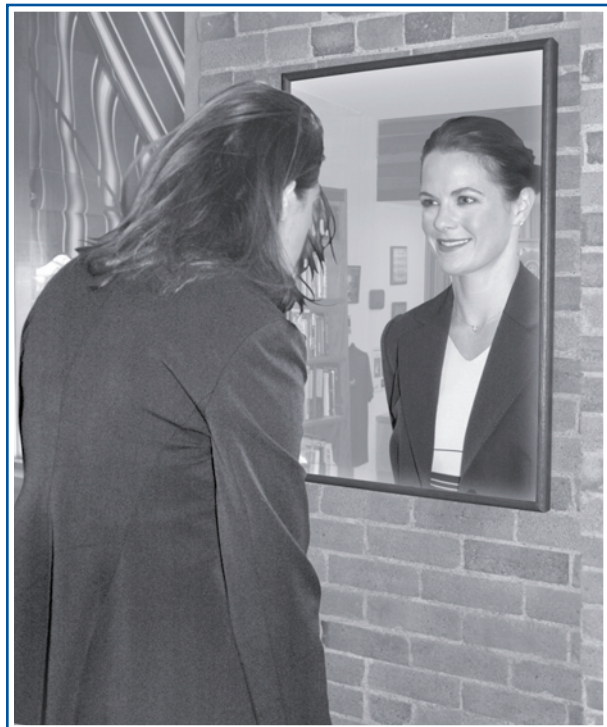


Figure 1. The Mirror Image

It is easy to fool ourselves into thinking we're doing better than we actually are. The person we see in the mirror is often the person we want ourselves to be. The reality is that many people are walking low-vitality time bombs and don't recognize how much risk they are taking and how much they are losing by not taking better care of themselves—or they are aware of that rottweiler lurking behind them but don't know what to do about it.

One of the insights we gain from peak performers in sports and other walks of life is that their world may not be so blurry at all. It has often been said of Michael Jordan, for instance, that when he was on the court, the game literally slowed down for him. What looked like a blur to everyone else looked calm, fluid, and focused to Jordan. Athletes frequently talk about being “in the zone.” Psychologist Mihaly Csikszentmihalyi referred to this state as “flow.” Flow is a deeply satisfying state of consciousness in which our concentration is so complete and we are so absorbed in what we are doing that our performance seems effortless, and we operate literally at our peak—on our respective playing fields.

Csikszentmihalyi argues that everyone goes into a flow state from time to time, but peak performers have trained themselves to get into the flow more frequently and for longer periods. Peak performance is no accident. The Michael Jordans of the world, in business as well as sports, have trained themselves and their physiology to operate in the flow, and we can do that, too. The problem is that things are coming at us so quickly that our physiology and our brains cannot handle all the information and process it effectively. Moreover, most of us haven't had the coaching and individual attention Michael Jordan has received throughout his life. Jordan is a remarkable athlete with rare talent, but he's also benefited from an extraordinary amount of coaching. Because of his native talent and his coaching, he is able to enter the flow state quickly and easily.

Ask yourself honestly, “Have I experienced this flow state? Do I experience it regularly at work?” If not, what's keeping you from it? That is the blur. There are too many meetings, e-mails, phone calls, problems, crises, opportunities, and demands on our time and attention. Nonetheless, you can turn blur into flow if you train yourself and your mind and

body to do so. If you could sustain high levels of performance at work without sacrificing other parts of your life, would you want that for yourself?

Edward R—a Life Careening Out of Control

He was one of the youngest partners in the then-prestigious firm Arthur Andersen. He made partner at a young age by pushing hard, and by anyone's definition, he was a shooting star. At 40, having been with the firm only 12 years, he was promoted to worldwide partner in human resources. But success carried a heavy price.

“The travel increased every year,” Edward told us. “I was younger and less experienced than other partners, and there were many, many issues coming at me quickly. The long hours, lost weekends, and travel all took their toll. I noticed that I was less resilient to the same work stressors that I'd previously been able to handle. When I made partner, the priorities between my wife and I changed. She shouldered much of the work at home, and when our oldest daughter started giving us challenges, I was not there to help. Everything went into my work. There was nothing left at the end of the day or week. My marriage was strained, conversations were limited, and I had no interest in other parts of my life and no energy to work on my family and marriage. At that point in my life, I had few friends and no time to develop them. It was hard enough just keeping in touch with my wife and family.

“If all I cared about was diving into work, I could have gone on indefinitely, but my health would have started to decline. Already, I was missing doctors' appointments and dental appointments. I'd started to have serious sleep problems, and with the lack of sleep came less energy for work. During the workday, I was good until about 2 pm, but after

that I found it harder to concentrate and was less effective at listening and interacting with my staff. My relationships with my direct reports began to suffer—and I had ninety of them. At one point I was literally falling asleep at work.”

Then the Enron scandal occurred, and Arthur Andersen began to unravel. Ironically, it may have been the best thing that could have happened for Edward R. “I had to look at myself in the mirror, and I realized that my attitude, health, and all that defines me had to change. I was at a Fortune 100 company and could have gone on to another one, but I would have run the risk of losing everything else in my personal life. At that time, I was not a strong enough man to make the decisions I did without help, and Andersen’s inevitable demise was one of the catalysts of change for me.

“I found a personal coach who helped me sort through my priorities and one of them was becoming healthy, so I started running. Consistently. I found that running increased my energy, reduced stress, and helped me perform at a higher pace through the day. I also began reading scripture in the morning and doing inspirational work, which helped me be a better father, leader, and husband. One insight I’ve gained is that it’s very easy to slip back into the old routines and let work consume your life. You have to be more conscious about what really matters.”

Interestingly, he also had an executive coach but admits that he did not really engage effectively with that coach because he was distracted and overwhelmed. Coaching of any kind is apt to be less effective if the executive is not fully “present” in the process. Research at Lore International Institute has shown that executives differ in their coachability. Executives who are low on coachability often have either mental barriers (narcissism,

defensiveness, or an inability to listen) or physical/lifestyle barriers (poor health or fitness, which reduces vitality, or dependencies on or addictions to alcohol, prescription drugs, sex, food, etc.). Unless executives are coachable and are able and willing to engage in assisted self-improvement programs like coaching, companies may be wasting their money by providing traditional executive coaches. Edward was not able to take advantage of the coaching he was offered until he could be coached as a whole person.

Edward R sees a direct correlation between velocity and vitality. In his words, “Velocity is about making a dramatic difference in an organization. You know your role, and you make things happen on a consistent basis. Your position on the organization chart doesn’t matter. You can make a difference no matter where you are in the organization. Vitality is having the energy, drive, enthusiasm, creativity, and innovation that feed right back into velocity. It is a direct loop. Even when things are not going well in your organization. You can’t sustain the velocity without the vitality. Having both creates real power and seamlessness, and vitality is not just about physical health; it’s about having enthusiasm for your self, your work, your family, and your community.”

Low Physical Vitality—the Personal and Organizational Impacts

It comes as no surprise that corporations worldwide are witnessing certified health epidemics in their organizations at all levels. There are short- and long-term implications for both organizations and individuals. For individuals, there are physiological and mental impacts of low vitality, and those impacts play themselves out both in their personal lives and in the organizations they work for. For organizations, the impact has been unprecedented increases in health care costs and key executives

being “taken off the playing field” as a result of lifestyle-related illnesses.

Dr. Marshall—A Loss of Human Talent

Take the case of Dr. Marshall M, a highly specialized oncology surgeon, one of about 200 such specialists in his discipline in the U.S. He told us, “When I am in the operating room, someone’s life is usually and quite literally in my hands. The level of stress and pressure has always been high, but when I hit forty it really started to impact me. I couldn’t concentrate as long, I had trouble listening to the needs of my patients, and I would come home at night and have nothing left for my family.

“My sleep began to suffer, and I also had much less patience with colleagues and support staff. I know that I began making mistakes while operating. I would always catch them during the surgery, but that takes extra time, and at sixty dollars per minute in the operating room, the cost is very high. I’ve found that unless I do some kind of regular aerobic exercise, get more sleep, and have some rituals around relaxation, I am in a constant state of exhaustion.” Marshall is not alone. Here are some startling facts:

- ▶ Over 60 percent of the workforce is considered overweight by traditional medical standards, and 30 percent of this group is considered obese.
- ▶ The U.S. Secretary of Health & Human Services reports that obesity-related deaths will surpass smoking-related deaths in 2005 for the first time in history.
- ▶ Depression is expected to be the number one occupational disease of the 21st century by many health experts.
- ▶ Seventy-five to 90 percent of primary care physician’s visits are for stress-related disorders.

- ▶ Eighty-nine percent of adults describe experiencing high levels of stress in their lives.
- ▶ Two out of three managers state that tension with colleagues arises because of stress associated with work.
- ▶ Corporate America is realizing a mean annual increase of 22 percent in health care premiums, often related to lifestyle-related diseases, including coronary heart disease, diabetes, stress-related disorders, and obesity.
- ▶ There are 41 million pre-diabetics in the U.S. alone. Often, these individuals are headed for a health care disaster and don’t know it.
- ▶ According to the National Sleep Foundation, over 60 percent of Americans report chronic sleep problems and most go untreated.
- ▶ Fifty-four percent of working Americans are considered sedentary—they get less than two days of even 30 minutes of moderate activity per week.

The current and looming impact of stress on personal health is particularly alarming. The short-term symptoms include headaches, low energy and fatigue, poor concentration, frequent colds and flu (which may occur due to a depressed immune system), impulsive or irrational behavior, and sexual apathy. The cost of sustained stress is much higher, including high blood pressure, coronary heart disease, strokes, and major psychological disorders.

As executive coaches, we can help mitigate some of the stressors in an executive’s life, but the realities of blur will be present as long as people choose to operate at a high level on any corporate playing field. What executive coaches can accomplish is to help fortify an executive physically and psychically to better cope with these stressors and dramatically increase their vitality and resilience.

Most executives, in keeping with their Type-A personalities, “attack” a program around diet, exercise, stress, and general health in the same manner that they do work challenges—full out. They hire a personal trainer, book a week at a spa when they feel burned out, or strictly follow the latest best-selling diet—for a while. Statistically speaking, seven out of ten individuals who start one of these programs will quit within six months of beginning. Sadly, they may start up again only when they have a heart attack, are diagnosed with depression, or have one of a variety of lifestyle-related health scares.

The statistics are staggering. Nine out of ten executives admit that their lives are careening precariously out of control, and they cite three principal reasons for this:

- ▶ They don’t have time for or access to sleep, exercise, and healthy living, which eventually takes a huge toll on them.
- ▶ They don’t know how to maintain their health and well-being—and they frequently don’t recognize when psychological or leadership problems emerge as a result of poor health, fatigue, or stress.
- ▶ They can’t sustain programs that could help them achieve a healthy lifestyle. Caught in the blur, they don’t know how to achieve sustainable changes that would slow the world down for them.

This is where realistic, actionable coaching can help. Just as we know that you can’t overhaul the infrastructure of an entire organization by reading a best-seller and executing on its formula in three months with success, you can’t improve and sustain your vitality with a quick fix from the latest best-

seller. Sustained changes begin with Simple Changes™ in one’s life. In our coaching of executives on personal vitality, we have found three areas that have great impact with very small changes sustained over time:

1. Exercise and Activity
2. Nutrition and Diet
3. Rest and Relaxation

We don’t expect high-functioning executives who have had no regular activity to begin by carving out three to five hours for exercise weekly. Successful coaching for improved velocity and vitality begins with a shared understanding not only of an executive’s goals but also of their barriers to change—both real and perceived. From there, a coach can begin integrating very small daily changes into their lives that are relatively low cost in terms of time and energy but start to build rituals that have long-term impact. Here are a couple of examples:

Seven out of ten of us are dehydrated. The symptoms include headaches, energy swings, dry skin, increased appetite, weight gain, poor bowel functioning, and so on. Complicating this picture is that many organizations are filled with beverages that further dehydrate—sodas, coffee, and caffeinated tea. Add travel and its dehydrating impact to the equation, and it’s safe to say that if you are reading this, you may be dehydrated.

We don’t ask executives to immediately stop their Diet Cokes, Pepsis, or Starbucks habit. We simply coach them to begin adding water before or after their current ritual. We routinely hear from executives that once they begin drinking more water, they start to crave additional water and less of the dehydrating liquid they had been drinking, and they begin to see many of the symptoms described above diminish or stop entirely.

Another Simple Change™ might include walking for five to fifteen minutes three to five times per week for a sedentary executive. This can be accomplished in a variety of ways including scheduling regular “walking” meetings with colleagues.

Diet and nutrition changes tend to be the most difficult for the executive operating at blur speed. Lengthy meetings, entertaining clients, rushing for airports all create a recipe for very poor nutrition. When you are hungry, and tired, rushed, or stressed, you tend to do what most of any of us would—reach for anything that looks like fuel. In most cases, this is the jar of M&M's in the boss' office or the Danish at the meeting buffet. It's easy to see why executives have trouble making sustainable changes. We often encounter people who strictly follow the current best-selling diet on the weekends or at their office, but they lose their discipline when their routine or schedule changes or when they encounter more stress. Unfortunately, the rebound effects—even greater weight gain, a return to poor eating, increased medical risk factors, and so on—leave them less resilient and vital than before they started the original program.

The answer is in creating new rituals that are planned around the week. Given our philosophy of small, routine changes, we believe that new rituals can be as simple as bringing healthy snacks to the office, in your carry-on luggage, and in your car. Like most behavioral experts, we've found that it takes about 21 days for a habit—either healthy or unhealthy—to form. We also know that once people see and feel the positive changes from creating a new, healthier ritual, they are much more likely to continue the ritual and increase the number of things they do to increase their vitality.

The next case study describes how one person with low physical vitality in a demanding job was able to make simple changes.

Lucy M—High Mental and Low Physical Vitality

“I'd been so conditioned to believe that if I wanted to have the life I wanted—continue to thrive and rise in my corporation, while keeping my weight under control and having some kind of vibrancy outside of work—there would have to be huge trade-offs. I've been so surprised at how incorporating rituals like drinking more water and making better snack choices even half of the time have had such dramatic impact. My energy levels and ability to engage during the workday are markedly improved, and I've lost twenty pounds. I can now regularly fly through two time zones and immediately make two business presentations without falling over in a heap.

“I work in the film industry that also intersects with state-owned commissions, bureaucrats, and regulations. My job requires me to be highly creative and sensitive for the film industry executives, while being much more strategic and linear with governors and state governments. This demands incredible mental dexterity and energy. I've learned to plan for small, important mental breaks and rituals, including specific types of foods to eat, as well as breathing exercises. These changes—and planning for them—are critical because my schedule fluctuates so regularly.

“I find that when I incorporate these changes, I am able to compartmentalize and prioritize much more efficiently. My sleep also suffered during protracted negotiations and complex business engagements, particularly when I traveled. Now I try to create

simple bedtime rituals that help calm my mind and body and allow more restful sleep more of the time. Maybe most importantly, I now come back from a business trip and have energy and enthusiasm to spend with my husband—and actually be engaged.”

The highly functioning executive has the ability to begin making small and sustainable changes that will impact his /her lifestyle and productivity—right now. The key lies in the process of stepping back from your life and work circumstances, if only for a moment. Consider, “What are my goals around a more vigorous lifestyle, and, as importantly, why do I have them?” We know that if you begin making changes simply because your spouse or doctor recommend them, they will not last. We advise people with low physical vitality to ask themselves these questions: “What activity or ritual could I start today that will have the most significant impact on increasing my velocity and vitality?” and “What barriers do I perceive that are keeping me from starting this ritual?”

Although it can seem counterintuitive for you to begin layering very small changes and rituals into your life when, at work, you’ve been used to forging headlong into these challenges, they have been proven to work. More importantly, there is a building process with increasing your velocity and vitality that creates a direct feedback loop. With each change, you can realize better concentration, more sustained mental and physical energy, and improve your health overall—both mentally and physically.

Low Mental Vitality

We have been talking about health, fitness, and physical vitality, and low vitality is often directly correlated with poor work performance because of fatigue, stress, and inability to focus or sustain effective effort. When people lack vitality, they may be unable to concentrate, may become fatigued or distracted in meetings, and may otherwise find that they lack the energy to sustain high levels of work performance over time. However, low physical vitality can also affect their personality and their mental balance. When people with low physical vitality are under stress, they can become abrasive, intolerant, inconsiderate, demanding, and even abusive. Conversely, people who have low mental vitality often start behaving in ways that lower their physical vitality.

Marilyn T—Running Hard, Losing Ground

Marilyn T was a senior partner in one of the world’s foremost management consulting firms. She was the eldest of three daughters of professional parents, and in their family, perfection was the norm. She was expected to get straight A’s in school, to excel in sports, and to be the best in everything she did. An attractive young woman, she did some modeling during her undergraduate years at Vassar and later went to Harvard Business School, where she graduated with the highest marks, and then was invited to join an elite firm.

In her first six years in the firm, she focused on making partner, and that meant sacrificing everything else in her life because she could not allow herself to be anything but the brightest, most promising, hardest-working, and highest-achieving person in her

tenure. She routinely worked 16-hour days and gave up weekends so her contributions to her projects would always be exemplary. In due course, she was promoted to engagement manager and then made partner. However, that milestone was still not enough. Now she had to work even harder to make senior partner.

When we became involved with Marilyn, she had become one of the most fearsome partners in her office, known for pushing teams relentlessly and crushing anyone below her who did not meet her high standards or sacrifice their lives for the sake of client service. As we began coaching her, we found a person whose health had begun to decline, despite the fact that she was still in her mid-thirties and had been athletic all her life. She was suffering from sleep disorders, and her personal life was all but in shambles. Although married, it was a tenuous union. She and her husband had wanted children, but she had been unable to conceive, and her physician advised that her lifestyle, and the stress she was enduring, was one important reason why. He advised her to take a significant amount of time off and focus on regaining her health, something she could not allow herself to do because she feared it would damage her bid to make senior partner.

In their book *Reinventing Your Life*, psychologists Jeffrey E. Young and Janet S. Klosko describe Marilyn's dilemma as the "Unrelenting Standards" life trap. They argue that workaholics, people who are driven to achieve, and people who need high status can become enslaved by the activities that can help them achieve their goals—and once they achieve their goals, they will set even higher goals. No achievement is ever good enough for these people, and they can exhibit excessive self-control, constant pressure on themselves and others, and emotional deprivation as they shut out everything

else in their lives in their quest for success. We have coached many such people, and a common theme is that their unrelenting standards hurt their performance as managers and leaders because they are unreasonably demanding of and harsh toward the people who work for them, people whose cooperation and goodwill they need to achieve their organizational goals. Ultimately, people chafe under this constant pressure, and organizational performance suffers, along with numerous internal relationships.

In Marilyn's case, it's not whether her low physical vitality precipitated her poor leadership or whether her need for perfection and her obsessive drive to achieve caused her health to decline. It's probably some of both. In any case, she is an example of a professional who is suffering from low physical and mental vitality—and it impacted her performance at work. Remember, we're not "brains on sticks." People who work hard and have no balance in their lives often demand the same level of commitment from their subordinates or partners and are not understanding if others are not willing to comply.

Through coaching, Marilyn was able to see the impact of her behavior on her health, her performance as a leader, and her subordinates, and she was able to turn her life around (she now has a son and is no longer demonized in her office as "the one person you don't want to work with"). However, many people in the working world are unable to overcome the effects of low physical and mental vitality, and they simply derail.

In the context we are using the term, *derail* means to be fired or demoted or to plateau in one's career below the level one should have attained. In a study of 300 middle- to upper-level managers, Michael Lombardo and Cynthia McCauley uncovered six common reasons for derailment: problems with

interpersonal relationships, difficulty molding a staff, difficulty making strategic transitions, lack of follow-through, overdependence, and strategic differences with management. Significantly, three of these six factors involve interpersonal competence or what Daniel Goleman has labeled emotional intelligence.³

Lombardo and McCauley did not attempt to correlate low physical or mental vitality with derailment; however, in our coaching of thousands of professionals and executives, we have seen numerous cases where derailing behaviors had at least an indirect link with low physical vitality or personality problems related to stress, fatigue, and poor health or fitness, on the one hand, and mental imbalances, on the other. Those mental imbalances frequently include being arrogant, aloof, or self-centered; micromanaging or being unwilling to delegate; being overly demanding, insensitive, or critical of others; being manipulative; being too logical (and ignoring emotional needs); or, conversely, being too passionate and ignoring logic.

Of course it's true that perfectly healthy and fit individuals can also lose their perspective and behave in ways that negatively impact others at work. We have probably all known the "jocks" who take care of themselves but are narcissistic, abrasive, or insensitive toward others, or who take too much of the credit for too little of the actual contribution, or who suffer from other negative behaviors that harm relationships and reduce organizational effectiveness. There is no guarantee that someone with high physical vitality will also be easy to work with.

An easy way to understand mental vitality is to think of it in terms of balance. As table 1 shows, either under- or overdoing virtually anything can result in problems. A balanced or healthy self-concept, for instance, enables people to have a realistic view of themselves. They tend to be self-accepting but have a strong drive for growth and improvement. They would probably fit Abraham Maslow's definition of self-actualization, which means they strive to be all they can be, to maximize their talents and capacity for growth and fulfillment. People with low self-concepts, on the other hand, generally lack self-confidence, have doubts about their abilities and chances of success, and may feel some degree of worthlessness. People with high or inflated self-concepts are likely to be narcissistic, arrogant, and egotistical. The key to mental vitality is having a balanced self-concept—neither too low nor too high.

As you can see from table 1, this concept of balance applies to how people trust, regard, and appraise others; how they mix logic and passion; how they handle conflict and communicate; and how they manage others, including how they set performance standards. Mental vitality depends on keeping the right perspective about yourself, your life, your work, and your relationships with others.

³ Michael M. Lombardo and Cynthia D. McCauley, "The Dynamics of Management Derailment," Technical Report Number 34 (July 1988), Center for Creative Leadership, p. 3.

Mental Balance and Imbalance

Area	Low/Under	Balanced	High/Over
Self-concept	Low self-confidence; self-doubt; feelings of worthlessness	Healthy, balanced ego; realistic self-concept; self-acceptance; drive for improvement/growth	Egotistical; arrogant; narcissistic
Trusting of others	Suspicious and paranoid; always expects the worst; looks through a glass darkly	Trusting but not gullible; acts with integrity and expects others to do the same	Excessive benevolence (Nice Guy syndrome); always expects the best; can be naive
Regard for others	Abrasive; insensitive	Sensitive, kind, and considerate but mature	Fawning; solicitous; obsequious
Appraisal of others	Too accepting; too willing to "turn a blind eye"; not demanding enough	Appropriately realistic; gives people the benefit of the doubt but expects them to behave well and meet standards; is appropriately demanding	Too critical; unyielding; won't give people breaks; too demanding; doesn't "suffer fools gladly"
Logic/passion balance	Too passionate/emotional; bases decisions on emotions; ignores facts or selectively uses facts	Balances emotion and logic; wants the right facts but also considers non-rational factors in making decisions.	Too logical; bases decisions on logic and ignores emotions, values, and people concerns; can suffer from analysis paralysis
Handling of conflict	Avoids conflict; procrastinates; won't deal with tough issues	Accepts conflict and handles it well; encourages constructive conflict and acts quickly to manage destructive conflict	Thrives on, causes, or perpetuates conflict or overreacts to it and intimidates people into complying
Communication	Controls information; keeps people in the dark; is uncommunicative	Communicates appropriately in the right forms to the right people at the right level.	Overcommunicates; provides or asks for too much information; is excessively needy about wanting to be kept informed even in areas not directly related to his/her job
Management	Laissez-faire management; over-delegates; inappropriately low levels of control	Effective management; good controls but also appropriate latitude for subordinates to act independently and responsibly	Micromanagement; under-delegates; excessive control
Performance standards	Low standards and expectations (leading to low performance)	Challenging but achievable goals	Unrealistic and unrelenting high standards

Table 1: Mental Balance and Imbalance

Mental vitality is usually a balance between extremes, as this table shows.

The healthy middle ground is always preferable to an imbalance on either side.

The Types of Vitality—and the Types of Coaching Needed

Traditionally, the concept of vitality has been associated with physical well-being. However, that definition is too limited. It suggests that if you suffer from low vitality, the solution is to go on a diet, start running, or otherwise “tune your body.” It’s not that simple. As we have seen from the previous discussion, people can also suffer from low mental vitality—and that may or may not be linked to low physical vitality. Here’s how it works:

1. First, many people have low physical vitality but are mentally fit. They find that they can work well and work hard, perhaps for years, and they may be very successful at work. However, their low physical vitality eventually takes a toll. Their energy and creativity begins to wane, and they are no longer as alert, focused, or aware at work. They start to experience presenteeism, or they discover that they are no longer as effective in client meetings, sales calls, and so on. Worse, they begin to have disastrous health-related issues: high-blood pressure, heart attack or stroke, diabetes, clinical depression, chronic fatigue syndrome, and a host of other such problems. The net effect is that they cannot sustain their velocity at work because of low physical vitality, and some of them suffer the ultimate consequence of not taking care of themselves—an early death.
2. Second, some people’s low physical vitality creates mental imbalances. Fatigue or stress, for instance, may cause them to be short-tempered, blame others for problems, or be abrasive or insensitive toward subordinates or peers. As previously discussed, there is also a

high cost in terms of lowered overall resiliency. Health-related problems can also lead to depression, which can cause people to be more negative, critical, and judgmental toward others; be pessimistic; or feel inadequate or worthless. In some cases, depression becomes chronic, and those suffering from it have less confidence, put less effort into their work, and lose whatever creative energy they might have had. We have seen a number of cases where low physical vitality has either caused or contributed to mental imbalances that impact people’s effectiveness at work.

3. Third, some people are physically fit and healthy but are imbalanced mentally and thus, in our terms, would have low mental vitality. Some people are victims of their own success and their unbridled egos. Others are too entrenched in their own way of thinking and may dominate teams and stifle healthy debate. Others are too controlling and won’t relinquish or share power or information. Still others are excessively conflict averse and may be passive-aggressive when challenged.

An example of someone who was physically fit but had, by our definition, low mental vitality is “Chainsaw Al” Dunlap, who achieved considerable early success as a business leader. As he grew bolder and more certain that he was right about everything, he became brash, bullying, and ruthless in his business decisions. As CEO of Sunbeam, he slashed 12,000 jobs, shut down 12 of 18 manufacturing plants, and reportedly engaged in “channel stuffing,” which means persuading retailers to buy more products than they need by offering huge discounts. Cost cutting and channel stuffing initially added considerable revenue to

Sunbeam's books, which inflated the stock price, but when overloaded retailers stopped buying Sunbeam products, the bottom fell out of Dunlap's scheme, and Sunbeam was eventually forced into Chapter 11. Dunlap later agreed to pay \$15 million to settle a class action suit by angry Sunbeam shareholders.

Dunlap fancied himself a corporate tough guy, a Rambo in pinstripes, and his ruthless style of leadership nearly destroyed the company he led. Although he took care of himself physically, Dunlap was arrogant, egotistical, brash, inconsiderate, and abrasive. His imbalances (see table 1) led to low mental vitality, by our definition, with staggering consequences to Sunbeam employees and shareholders.

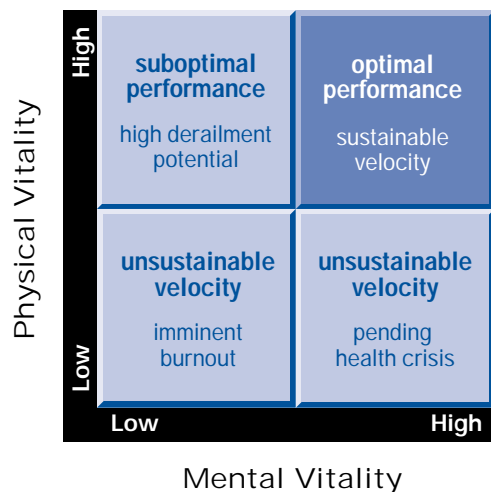


Figure 2: The Vitality Quadrants

Having low physical vitality will nearly always result in unsustainable velocity. You can run hard for a while, but burnout and various health crises are unavoidable in the long term. Having low mental vitality will result in suboptimal performance and the high potential for derailment.

Clearly, the coaching intervention that is appropriate for executives who need coaching depends on whether they suffer from low physical vitality or low mental vitality or both. When we work with clients

who are mentally fit but have low physical vitality, the solution is generally focused on improving their health, fitness, nutrition, hydration, and related aspects of how they care for themselves physically. Improving their energy, resiliency, and physical vitality is the key to helping them improve their performance and develop a healthier and happier lifestyle.

However, if their low physical vitality is directly or indirectly creating mental imbalances, then coaching generally cannot focus only on restoring their physical vitality. They are likely to also need the kind of help typically offered by an executive coach—with focus on how they are interacting with others, how they are leading teams, how they are relating to clients, and so on.

When they are physically fit and healthy but have psychological issues causing poor performance, then they need more traditional executive coaching. Most often, the issues at the root of the problem are disguised as “operating style” or “leadership” problems, but fundamentally they result from people being excessively independent, proud, vain, stubborn, focused, domineering, controlling, and so on—and these are the issues coaching must address to be successful.

Can you sustain high velocity in your life without having sufficient vitality? We think it's very unlikely. Some people are strong and resilient and can force themselves to perform at peak levels while maintaining a personal life, but such people are rare, and it's not clear that even they can sustain high levels of velocity indefinitely. Vitality is essential, and many people see a direct connection between vitality and velocity and company success. To William Hebb, co-founder of Hebb Industries, the equation is very simple:

Vitality = Energy = Confidence = Sense of well-being = Sales = Profits

Dr. Edward Bergmark, CEO of Optum, equates vitality with energy and enthusiasm. In his view, having low vitality is like trying to run a marathon with a broken leg. “If you’re not healthy [physically and mentally], you can’t perform with velocity,” he told us.

Nathan Birchall, CFO of a technology company, observed that it’s very hard to juggle family, friends, vacations, work, and satisfaction in all aspects of your life. He felt that there is a direct connection between working hard and playing hard and that vitality is the difference between greatness and mediocrity. Vitality matters, he said, because “our business is fast paced, high risk, and highly competitive. There are a lot of smart people who will work harder and pass us by if we aren’t careful. You can sustain velocity for a season, but you can’t do it for a long period of time without vitality.”

So, how do you sustain both high vitality and high velocity?

Sustaining Vitality and Velocity

Almost everyone in the world of work reading this paper grapples with embracing blur while maintaining their equilibrium in the workplace and at home. The statistics indicate that individuals and organizations pay a costly penalty when people suffer from low physical or mental vitality. As we engage executives in coaching, we find that many people are not even aware of that rottweiler lurking behind them.

Unless you become aware of the hidden dangers that will sabotage you both professionally and personally, you have little opportunity to make actionable changes in your life. The process begins

with awareness and the recognition that having low physical or mental vitality can diminish your effectiveness at work and impact your ability to maintain high velocity in this world of increasing blur—or cause you to sacrifice parts of your personal life that you will one day regret.

Next, it is important to do a candid self-assessment or be assessed by a coach competent to evaluate you as a complete person, including physical and mental vitality. For illustrative purposes, we have included a simple self-assessment as the appendix to this paper. Although this self-assessment should not be seen as a definitive assessment of your vitality, it is a simple way to determine whether you have any vitality issues worth discussing with a competent coach.

If this self-assessment reveals that you are low or somewhat low in physical or mental vitality, bear in mind that you did not reach this point overnight. There probably was a time when you had sustained energy, were patient with co-workers and customers, slept well and kept in shape, had time for your personal life, and had the energy and focus to perform optimally. You probably did not self-medicate or use other strategies to try to maintain your equilibrium, and you probably felt motivated, engaged, and excited about most aspects of your life and work.

Losing some of your vitality probably took time; likewise, regaining it will not be an overnight process following a crash course. You will need patience with yourself and the process, and it usually means taking your life back one small step at a time, beginning with a good assessment of your needs and finding the right resources to help you.

In working with thousands of clients, we have found that the best approach involves setting appropriately realistic goals for yourself, taking small steps that you can do on a sustained basis, and having people to help you who can offer the right suggestions and reinforce your successes while helping you avoid the pitfalls that prevent so many people from achieving their goals and increasing their vitality.

Vitality Self-Assessment

This simple self-assessment will help you determine how vital you are—physically and mentally. Although not scientifically valid, this tool should be directionally accurate if you answer each statement candidly. For a comprehensive assessment, you should see a qualified coach.

For each statement, circle T for true or F for false. For statements that are not clearly true or false, choose the response that is closest to being most accurate. Note that the T's and F's sometimes appear on the left and sometimes on the right, so be sure to circle the correct response for each item.

Physical Vitality

1. I get enough sleep on a regular basis to feel rested and energized during the day.	T	F
2. I sometimes have trouble falling asleep or staying asleep because of work-related stresses.	F	T
3. I sometimes become sleepy during the workday and have trouble staying awake or working with full concentration.	F	T
4. I often self medicate with over-the-counter or prescription medication, or alcohol to fall and/or stay asleep.	F	T
5. I find myself in a sleep deficit or "catch-up" mode following my work week or business travel.	F	T
6. I have a regular bedtime ritual that prepares me for a restful night's sleep.	T	F
7. I use sugary beverages, sweets, or caffeinated beverages regularly when I need a boost during the day.	F	T
8. I find that there are very particular periods of time during most work days when I find it very hard to maintain my concentration.	F	T
9. I have been or still am on a structured diet. I often try the latest diets, at least for a while.	F	T
10. I have never had a weight problem or have lost weight and been able to keep it off for more than one year.	T	F
11. Candidly, I weigh at least ten pounds more than I should.	F	T
12. I drink at least 64 ounces of water daily (eight 8-ounce glasses).	T	F
13. I drink more than 24 ounces of beverages that are caffeinated at least four times per week.	F	T
14. I am usually prepared with some type of healthy snack during my work day.	T	F
15. I usually reach for any readily available foods/snacks during the weekday when I find myself running late for meetings or am under stress.	F	T
16. I occasionally feel dehydrated and have to force myself to drink fluids.	F	T
17. I'll drink alcoholic beverages to help me release the stress of a work day.	F	T
18. During the day, my beverages of choice are sugary colas or soft drinks, coffee, tea, or alcoholic beverages rather than water.	F	T
19. I get at least 20 minutes of some type of aerobic activity, e.g., walking, swimming, jogging, etc. a minimum of three times per week.	T	F
20. I get at least 15 minutes of strength training and stretching activity a minimum of two times per week.	T	F
21. I have started and stopped a diet and/or exercise program at least once during the past 18 months.	F	T
22. I try to exercise as much as I know I should, but my schedule doesn't permit me to do it regularly.	F	T
23. I consider myself to be in excellent physical condition.	T	F
24. I find that I have felt more stressed and tired during the past year than in the previous three years.	F	T
25. I feel that I have been less resilient in my work setting in the past one to three years.	F	T
26. My physician or primary care health practitioner has advised me to increase my activity and/or lose weight in the past 12 months.	F	T
27. I am aware of having at least one major medical risk factor in my life currently, e.g., hypertension, high cholesterol, clinically diagnosed anxiety or depression.	F	T

Mental Vitality

28. I sometimes find that other people have trouble keeping up with me.	T	F
29. I believe in the old expression that “two heads are better than one.”	F	T
30. It’s important to do what’s right for the organization, but you have to look out for yourself first.	T	F
31. It’s important to work collaboratively with other people, but you must also have your own ideas and not be afraid to assert your views, even at the risk of disagreeing with everyone else.	F	T
32. I sometimes question whether I can do what needs to be done. I’m not sure I have the knowledge or skill to do it right.	T	F
33. I always expect the best from people, and that might be naïve sometimes.	T	F
34. I always “tell it like it is,” even if some people are offended.	T	F
35. I sometimes receive the feedback that I don’t listen as well as I should.	T	F
36. I have strong opinions about what’s right and wrong and refuse to compromise about that, even if it causes conflict.	T	F
37. When tired or under unusual stress, I am able to make clear and accurate business decisions most of the time.	F	T
38. I would rather not make a decision until everyone has been informed about the issues, has had a chance to voice their opinion, and we have consensus on what should be done. It’s more important to make sure everyone agrees than to make decisions quickly.	T	F
39. I have very high standards and don’t “suffer fools gladly.” I would rather be overly critical of people who don’t measure up than to “turn a blind eye” to them and accept average work.	T	F
40. I believe in basing decisions only on facts and logic. Sure, so-called “people concerns” are important, but you have to solve problems and make decisions rationally. Allowing people’s feelings to get in the way is a mistake.	T	F
41. Candidly, I avoid conflict whenever possible. I’ve found that most conflicts resolve themselves in time, and I just don’t enjoy dealing with conflict between people.	T	F
42. I don’t really need other people’s approval, although it’s nice to have. I’m comfortable with myself and my work.	F	T
43. I can be stubborn at times. If I know I’m right, I will dig in my heels and refuse to budge.	T	F
44. I have very high standards for myself, and I probably drive myself too hard, even at the expense of my personal life.	T	F
45. I find that to get the quality of work I expect, I often have to become directly involved in work I have delegated to others.	T	F
46. I tend to view the glass as half-full rather than half-empty, and I try to be encouraging to people, even in hard times.	F	T

Physical Vitality Score

Note the number of items you circled in the *left* column. This is your physical vitality score. Your physical vitality rating is as follows:

- 24 to 27 **Excellent.** Keep it up.
- 17 to 23 **Average.** Your physical vitality is about average, so you have some key areas for improvement. Note where your responses fell into the right column. These are physical vitality issues you should address.
- 16 or less **Problematic.** You may have some major risk factors and could benefit from a program to increase your physical vitality. You are unlikely to sustain velocity unless your physical vitality improves.

Mental Vitality Score

Note the number of items you circled in the *right* column. This is your mental vitality score. Your mental vitality rating is as follows:

- 16 to 19 **Excellent.** You have a strong, balanced perspective.
- 12 to 15 **Average.** Most people fall into this range. You are likely to face some challenges in your day-to-day work but can probably handle most challenges well enough. Note, however, where your responses fell in the left column. These are areas to examine.
- 11 or less **Problematic.** You may face some serious challenges now and then. You could benefit from a careful examination of your mental vitality and perhaps help from a qualified coach.

About the Authors



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Terry is Founder, CEO, and President of Lore International Institute. Terry served as a U.S. Army officer from 1969 to 1974. During that period he was an artillery officer, an intelligence analyst, and a counterintelligence officer. He finished his army career as an analyst for the Defense

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In his career in corporate education, Terry has created nearly fifty programs in writing, speaking, interpersonal skills, conflict handling, leadership, proposal writing, management, selling skills, influencing, marketing, strategic planning, and account management. He has delivered thousands of workshops to business groups worldwide. He has also served as a psychological counselor, working with clients in the areas of self-development, career development, leadership, conflict and problem resolution, and sexual abuse.

Terry is a prolific author, having written or cowritten nearly eighty books, film scripts, simulations, and white papers. His books include *Leadership Through Influence*, *Effective People Skills*, *Leading in a Boundaryless Organization*, *High-Impact Facilitation*, *Helping Customers Buy*, and *Proposing to Win*. He has also created a number of skills surveys and assessments, such as the *Survey of Influence Effectiveness*, the *Coaching Effectiveness Survey*, and the *Lore Leadership Assessment*. Terry is a

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About Lore

Lore is a firm specializing in professional development, corporate education, and consulting services related to maximizing business results through people. Though headquartered in Durango, Colorado, Lore provides programs and services worldwide. Our firm helps clients differentiate themselves and grow their businesses through the development of people and the processes and tools they use to do their work. Lore's Research Institute, Consulting Group, and Professional Development Group work in concert to provide practical, research-based solutions through a variety of consulting and learning methodologies.

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