

**EPISODE 22**

[INTRODUCTION]

**[00:00:05] ANNOUNCER:** You're listening to 10,000 Swamp Leaders, leadership conversations that explore adapting and thriving in a complex world, with Rick Torseth and guests.

[INTERVIEW]

**[00:00:20] RT:** Hi, everybody. This is Rick Torseth, and this is 10,000 Swamp Leaders. This is the podcast where we talk with people who have made some decisions to either lead or help other people lead around what we call swap issues, or messy problems, or wicked problems, whatever the terminology you want to use.

On this episode, and getting ready for it, I'm mindful that I have had probably a pejorative orientation to the nature of these problems being external to the human beings who are trying to deal with them. And in today's conversation we have an opportunity to sort of blend that with the reality of human beings being complex themselves with my guest today.

My guest is a friend and colleague I've known for a long time, Bart Parrott. We did some work together in Seattle area for a few years. And he has relocated back home a long time ago actually now, Bart, to Virginia.

Bart is a consultant with the Wealthbridge Partners. And that is a body of work that they do that helps families deal with the complexities of their own businesses, and generational transfer, and wealth management. And I'm pretty sure Bart's got some familiarity with complexity human beings that we can dig into a little bit here.

So, Bart, welcome to 10,000 Swamp Leaders.

**[00:01:33] BP:** Thank you. I'm delighted to be with you.

**[00:01:36] RT:** So, before we get into any Q&A kind of stuff and dialogue and stuff, tell people what you think is useful for them to know about you as sort of context setting. And then we'll dig in.

**[00:01:46] BP:** What I'm really interested in that I think is relevant for your podcast is focused on fostering active learning in organizations and family enterprises. And so, the reason for that is I think that's the best way for people to create the future they want together. And I think the ability of groups to learn and adapt together is really their greatest asset. And that includes kind of updating their shared story about what they're doing.

So, my favorite thing is really help people figure out what future they want to create together and then how they're going to do that. And I think that connects to your podcast, that there's usually a lot of messy problems along the way. And it requires great leadership and kind of an active approach to learning.

**[00:02:30] RT:** Okay. You've already presented us with the direction I think is at least a useful start. But when you and I were talking last week in preparation for this you mentioned to me, and honestly, I don't remember now, except I remember being stunned. For people to understand this, tell people – We had a very significant percentages of businesses in this country that are really family-based businesses. And I was really stunned by that percentage. So, put this dynamic of family business in a context that people understand relative to how all work gets done by businesses in this country.

**[00:03:04] BP:** Yeah, I don't have accurate numbers. But it's true in this country and also certainly worldwide that the majority of businesses are family businesses. Or you could also call them owner-led businesses. So, it's kind of the oldest form of business. And so, these issues are very relevant. And I think they have their own set of opportunities and challenges compared to, say, public companies.

**[00:03:29] RT:** Okay. So, tell us. It's curious to me, and I don't know the answer this question. I've known you for a long time. How in the world out of all the spaces of consulting, and you have a deep background in varying forms and and focused areas for consulting, how in the world and what attracted you to this niche of family-run businesses and helping them?

**[00:03:49] BP:** I just find it a lot more interesting than straight corporate work, if you will, that I've also done, which is also – I mean, I found a lot of it fascinating. But I think in family enterprises, the economics certainly matter. But the relational piece is also in the foreground. The hard and the soft, if you will, both matter a lot. The economics, and the decision making, and the governance all matter. But the family relationships are also a value that you're working towards. And so, the business needs the family and the family needs the business together. And I just find that out of my own background and work to be more interesting.

**[00:04:30] RT:** And you've been at this, in this sector, for quite a while now.

**[00:04:33] BP:** I have.

**[00:04:34] RT:** So, you set this up a little bit, and I really want to understand this more closely. And you sent me a note in advance. I'm just going to read your writing. And you pretty much just said this. But I want to amplify about your background. I believe that being intentional about learning together from experience is the best way for people to bring about the future that they want to create.

Now, that's a pretty heady aspirational possibility, which I fully buy into. But help people understand why is that important? How do you go about doing that? What obstacles do you experience in that system of family? And what have you seen come out of it that you think makes merit for pursuing this work? A lot of things there. So, I'll let you chunk it out. But, yeah. I mean, because it strikes me that that's what you get up every day to go do, is to create experiences of this happening with a family. This is where it starts for you. Help these people who are, by the way, accustomed to thinking about the messy wicked problems as being global warming or varying things like that. You're right into bowels of the family business here. And so, that's our lives. We all have families. I'm curious what you know about this stuff that can help those people who are listening.

**[00:05:53] BP:** Well, I think it actually applies to any organization, because we bring ourselves to work no matter where we work. And I think there's a lot of ways into this question. One way to think about it is can people sit in a room together and be fully there and focused on what they're

going to do? Or are they dragging in old business with them that is not yet complete that's getting in the way of what they need to do?

**[00:06:23] RT:** An old business could be actual old business or old family business, family relational business. Is that fair?

**[00:06:31] BP:** That's right. That's right. One way to think about it is family systems, there's been a lot of work in family systems dynamics and family therapy. And we don't do therapy. But we kind of engage in some of those same issues with people around what they're trying to create and how they do it.

Family is the greatest example, because we're never hinged to anybody, if you will, emotionally hinged like we are with our families. And so, what I find is that if you are working with a successful family, they've had whatever got them there. But often, they hire a consultant at a point of transition. One way to think about it is kind of we're in the transitions business. How do we help them go from where they were to where they want to go? And often, that means having to rethink or even let go of what got them here. I think a number of people including the coach, Marshall Goldsmith, had said, "What got you here won't get you there."

And so, we work with people at the point of transition where what had helped them be successful is no longer going to work going forward. And so, those changes are really hard for all of us to make. And so, learning is not so much about I think skills and curriculum, as it's really about reflecting on what are we doing? What's working? Where do we need to let go of? How do we kind of update our story? I sometimes think of our work as helping families update their story about what they're doing, and why, and how, and then live into that story going forward.

**[00:08:06] RT:** This is a interesting process for family business. Also, strikes me to be an interesting process for an individual to travel. But let's focus on your area. Talk a little bit about the how helping a group of people who are related update their story. Create a future that isn't the future that they're tracking for. Now, what does that work look like with the group of people like this?

**[00:08:31] BP:** Well, sometimes there may be an element of it about skills or knowledge they need to acquire. But really, learning has a real component of reflection in it. So, John Dewey and others have said in various ways that learning doesn't happen from experience alone. That it's experience plus reflection equals learning.

So, you help people with self-awareness and understanding of what's going on with them and how they got there in order to help them figure out where they might want to go. And so, often, we are fighting the last war, if you will. Or however we saw the world, we want to keep seeing the world that way because it worked for us before. It's helpful to have – Sometimes just a step one is where are we and how do we get here?

And so, a real deep dive into facts about – And this applies, again, to any organization. What problem are we trying to solve for? What are we trying to do here? What worked for us before and why? And then where do we want to go? And what do we need to do differently to get there?

So, mostly it's helpful if people are engaging in this work themselves as opposed to a consultant coming in and PowerPointing them to death. But it's really an active inquiry. How do you understand your situation in order to then take the next step?

There's a great book called *Flawless Consulting* by a consultant called Peter Block. He said the problem with most consulting projects is the consultants are the ones who learn the most, and then they leave. I think the goal is how do the people who are actually making the decisions and living into it, how do you help them engage with the right questions, and the right facts, and the right perspectives so that they can come to their own understanding of their situation and where they want to go?

**[00:10:24] RT:** Yeah. I can imagine people who listen to this show going, "Rick, this is your moment right here." Asking how in the world do you do some of that work? How in the world you foster a space, a container, if you will, for these people to reflect, to review their history, their assumptions, their old story, or their current story to get this new material? I'm thinking, this new material, these new ideas, these new ahas out that can then become the material to formulate a

future that they're talking about. What's some of the things that you have learned in your work about how to actually move people along in this direction you're talking about?

**[00:11:08] BP:** Well, you lay out a process and you have to schedule the time. Often, the hardest thing is getting the time and the attention of people who need to be in a room or on Zoom as it were. And then, I mean, as the consultant, it often starts with talking to people. Understanding what's going on? What are the things that matter here?

I think the thing I value about consulting is that you get a lot of practice at going into a situation and trying to understand quickly what matters and why. And I think there is a role for outside people. I think leadership has to come from within organizations. But I think the benefit of being an outsider is that – I don't know. When I've been in organizations, it all feels kind of very personal and very – We're really in the thick of it together. But when you have the privilege of going into a lot of different organizations or enterprise, you kind of start to see it as more archetypal, like, this is the human condition. This is what we're grappling with together. People trying to make sense of what's going on.

And so, it feels a lot more neutral. It's sort of like if you've ever moved yourself, it's really hard. Like, I have to put all my stuff in these boxes and they all have this meaning. The value of having someone to come in and move for you is they don't have that emotional entanglement with all that stuff. And so, I think part of the value of an outside person is you bring experience pattern recognition and don't have the same insiders' challenges, if you will. Ultimately, leadership really has to be from the inside. The outsider's job is not to step in a substitute for a leader. It's to help the system build its capacity.

**[00:12:55] RT:** Okay. Okay. I'm quite interested in your description, we're in the transition business. And I was just in a session with a client two days ago where, oddly, or coincidentally, it's partially a conversation about a transition of the first-generation founders to some family members who are in the process of assuming leadership of the organization. And the conversation is all framed under the heading of transitions.

We're on Zoom and I said, "I think transition is a fancy word for change." Meaning, we're in this current reality, and what we want is this thing out here, what you're calling the future. And we're not really sure how we get from here to there.

And so, what occurred to me – And there's several people on this call, and we were discussing, figure out ways to support them in that deal. And you should have probably been on this call with us. You'd had more to add than a lot of us did. But I'm also struck by the diagnostic capacity you're talking about, about observing the system, and understanding it, and reading it. And as you said the archetypes, start to show up rather quickly because you have the skills to do that observation in the space.

But it also strikes me that part of the transition is that thing you talked about, which is what do we keep? What do we get rid of? And what do we need to add to create a future. Some variation of that exploration.

I mean when you're talking about – Especially family, getting rid of stuff, you're talking about – Like you said, suddenly you're putting your stuff in the boxes and you're saying, "We're going to get rid of some stuff." And you're frozen for this moment with a thing that you think is personally life forever, and it may be fungible.

I'm imagining that you are oftentimes a facilitator of a smaller processes about helping them navigate those moments of decision about what goes forward, what stays, what do we add? And if that's so – Yeah, I could be wrong here. How do you do that? What do you do there?

**[00:14:46] BP:** Well, I think part of it is understanding kind of the nature of leadership and transitions. And this is true – This could be true for nonprofits to anyone who follows a founder. In a successful family, the founder is often the wealth creator. Although, I think it's kind of crazy how some families don't start counting until they make a lot of money. That person is called G1. Well, what about all the generations of families before? But it is a useful thing to say, "Okay, G1, generation one, is the one where the family's life changed where, let's say, they were very successful."

That person is often a kind of single leader, and there's a kind of hero model to that person. I think the challenge in going to the next generation is that people just try to find when it's time for a transition, to find the next kind of hero, larger than life hero. But the dynamics are different. It doesn't really work to do that. The nature of leadership is different after a founder. It's going to be much more participatory. There's a lot more stakeholders. There's a lot more people who will try to veto in one way or the other.

And so, your cousins knew you when you were a little punk. So, they're not going to have the same reverence for you as the new family leader as they did for their grandfather or their father. And so, it's much more in the next generation about pulling people together, about engaging stakeholders in useful ways. And it doesn't mean there aren't different roles. And it doesn't mean that there are no levels of authority. There need to be clear levels of authority and defined participatory roles. You need a system that works. It's not a free-for-all. But there will likely not be a workable solution in which you have a single leader that, again, tells everybody else what to do and they follow.

Part of helping a family grapple with these things is having useful ways to get the key stakeholders in a room and come at it from different ways to understand what's important to them? What they value about their history? Their values and their legacy? And that requires reflection. And reflection doesn't just mean I sit in a room by myself and journal. But it's discussion. It's interaction. It's looking at a set of facts together. It's telling stories together. Stories contain so much of what matters to us.

And so, when I talk about families, helping families update their story, it's literally update the story that they tell to each other about what they're doing. Like, "Oh, we're this kind of family." Or "We build things." Or "We make things." Or let's say you're a family who was in construction and built things and then you've sold your business, and now you're a family who invests its assets financially. Then that identity as a builder, like, what do you do with that? Who are we now?

And so, it takes a little time to explore, understand who you are. And that's basically figuring out engaging ways for people to interact and have fun together. And this is not a somber thing. These are good problems to have. This is really about engagement. It's often about having fun



together in some way. Telling stories. Trying to understand what matters to people and what they want to carry forward.

I feel like I'm not answering you with tips and techniques, because it varies so much on what the actual situation is and what's the culture of the family and how they like to do things. But you're really listening for what matters and how to help people get focused on it together. And ultimately, they have to do some meaning making and sense making about where they are and where they're going. And so, often the job of the outsider.

And I think this is true in, let's say, a mission-driven non-profit as well. The value of an outsider can be to mirror things back to people. And often board members play this role. Board members can mirror back to an organization, "Here's what I'm seeing. Here's what you're not paying attention to. Here's a different way I've come at this or think about this." And we all need that. I absolutely need that in any endeavors I'm involved in from the inside.

**[00:19:11] RT:** Okay. As you're talking there, I'm thinking we're talking in some ways about family transitions. But as a founder or somebody – And I've seen this a lot in in not-for-profits, where the not-for-profit finally found itself and expanded and grew robustly due to the arrival of a particular leader. And maybe they had skill and craft and they knew how to do this and suddenly things that.

There's a – In the transition here. But inside an organization, whether it's a family business or not, it also strikes me that you have an entire organization of people who are also somehow subscribing to the story that's in existence that may have originated inside the family. And so, they're storytellers of that same story maybe from a slightly different angle. Talk a little bit about when you're in there helping the nuclear group evolve, how do you advise them to account for the larger organizational system that's actually getting work done here that also is going to be experiencing change, transition, loss, new stuff as well that they have to account for?

**[00:20:19] BP:** That's such a great question. And I think a lot of it is to have them go spend time with people who do the work. Spend time in the system. Get out of their offices. Go talk to people. Engage, interact. Actually, join them and do some of the work that they do.

I think, again, as an outsider, I'm always listening for is what's the aspirational story that people tell about who they are? And no one lives up to that. Our country has a phrase working towards a more perfect union, to build a more perfect union. We're never there. We're always working towards that. And the same with any successful company or family enterprise, they have an aspirational story about who they are. And that's the leader's job to help foster that vision, and to put it out there, and to help pull people towards it. And pretty much 100% of the time, that's aspirational. And then there's the on the street, on the ground version of how it shows up.

And so, part of what you start to notice is going into places, is how big is the gap between the aspirational story and the on the ground story? And so, part of a leader's job is to keep trying to close that gap. Because one of the dangers of success is people start believing their own press releases and their own aspirational story and stop grappling with reality or continuing to try to close that gap.

So, when you talk to other people in the organization, you're getting a picture of that gap between the visionary aspirational story we have about ourselves and how people who are in it actually experience it.

**[00:22:06] RT:** So, down on the floor, for example. I love the idea of going down or doing work with them. If you were to venture down there – This is just really interesting for me. I'm likely to find that the story they're telling each other not only is not my story and therefore the gap. But it seems possible that if I was willing to put myself into a real serious listening mode, their story might be more accurate than my story about how it's actually going day to day. Is that fair?

**[00:22:37] BP:** That's right. And that's part of what – This is a whole another conversation. But in manufacturing, Japanese took American ideas that Americans wouldn't listen to and built the Toyota system, etc., where they drove more information gathering and decision making closer down to the people doing the work. And so, it's probably trying to close that gap.

And there's the famous NASA story, which I'm probably going to get wrong about you know it's going to be successful because the guy sweeping the floor could tell you the mission of the company. They knew what they were there to do. And it's never perfect, right? But when that

gap gets too big, the place is going to fall apart in some way. And transitions are where things fall apart.

When I say actively learning together, it's can people have the willingness to engage in the reality of what's actually going on in order to be able to address it? And that's not free. That can be painful. It's a lot of work. I have to maybe let go of my privileged physician about how I see things and be willing to look at reality together.

Essentially, in a transition, if you can help a system look at reality together with fresh eyes. Decide, "Okay, this we definitely want to keep." Usually, the things that keep coming up as they talk about who they are, those are the values that you want to keep. You may apply them differently going forward. But that's going to be the core of who you are. And again, that can be in a for-profit business as well. But you're going to have to apply those differently going forward because the world that you live into is going to be different in the future than in the past. So, that's the through line. Like, who are we? Okay, we're builders. Let's say that's who we are. Well, the world we would be building stuff in is very different.

And so, how are we going to carry that forward? How are we going to re-adapt it? Reinterpret it? Bob Dylan's famous line, "He not busy being born is busy dying." And that's the same for any enterprise or organization.

**[00:24:51] RT:** I just want to mark this one out. Bob Dylan has finally arrived in the swamp. Probably a place he's been his whole life. Actually, I'm just arriving to Bob Dylan's swamps.

Hey, you said something back here that I really – I just really want to tease this out. Transitions are where things fall apart. Say more about that. Because there's a lot of work spent on the design of transitions. Where do you know we're transitioning? Let's make a plan. Let's get cells organized so we can move gracefully, flow from here to there.

Talk about it. What's going on when it falls apart? What are they missing? Because that strikes me as so bloody accurate. And people aren't anticipating that this could all fall apart in our grand plan. What do you know about this? And how do you counsel people to deal with it? Because it also seems, Bart, that we can actually make our plan with the understanding that transitions fall

apart in this process oftentimes. So, let's plan for that. But you can't plan for every contingency. What's the process of staying fresh with what's happening in case you have to continue to adapt your transition to get where you're going so it doesn't fall apart?

**[00:26:03] BP:** All the operational planning that you mentioned is very important, of course. All that has to be done well. And you can fall apart by not doing that operational planning well. I'm talking about things sort of on top of that. I think the most common thing is that the strategy that worked before in certain conditions is we all want to keep doing what's worked before.

**[00:26:26] RT:** Why? Why do we want to keep doing that?

**[00:26:28] BP:** Well, I personally am lazy. And if I can keep doing what I was doing before, then that would be great. Also, it's anxiety-provoking. You talk a lot about change. Change is anxiety producing for people. And it's literally a stressor in our bodies. And we're designed in some ways to avoid that if we can. Although, our species also went out exploring. And that's in us too. Both of those things are in us.

We're hardwired for homeostasis in some ways for things to stay the same. And we also are hardwired to explore, and to create, and to advance. And those things, you can feel the conflict in that in many organizations or family systems, or in myself, I feel that conflict.

I think the reason things fall apart in transitions is you had a certain stable system that was producing good enough results. But then things changed. The leader's no longer there. The thing that held it all in place, the stability that held it together is not there. So, the lid comes off in some ways.

And then, also, the external situation has changed, that people have to function in. If your business is the market, or if you're an advocacy organization, the political system that you're operating in, the political climate you're operating in.

**[00:27:55] RT:** The economy, for example, would be a change –

**[00:27:57] BP:** The economy. Yes, of course. All of that is changing all the time. But unless we are conscious and intentional about it, we kind of keep doing what we did before until we get whacked on the head by the world and saying that doesn't work.

There's a process of adaptation, and change, and growth. And many, many people have said this and are saying this all the time, right? "I'm just giving you my particular view of the elephant."

I think, also, social systems can be slow to adapt together. For example, in a family, there are relational challenges. There are old hurts that people never cleaned up. There are old grudges. There are things that keep people from being able to adapt and move quickly together.

One thing I've really gotten from the study of family systems work, which is I think incredibly useful even if you don't work with family businesses, is that part of a win with a family, let's say, a board or something together, is can they sit in a room and just be neutral together and be focused together on the future? Or how much are they sitting in the room together and they're really dealing with issues over from the past 20 years? And that would keep them in a nimble fluid way from engaging together about what's next.

**[00:29:26] RT:** In your experience, generally speaking, how's that go down?

**[00:29:30] BP:** Well, I think we've all been in that meeting where things feel stuck and it feels like we're not really talking about the thing that matters. Or we're having the same conversation over and over again. Boredom is a good clue, right? If we're sitting in a meeting and we're all bored, then sometimes the role of an outsider can be basically say, "This is a boring meeting. Nothing's happening. What's going on here? What are we not talking about?"

And usually, the ability to have difficult conversations, or crucial conversations, or important conversations, or courageous conversations, whatever you want to call it, is a skill that's really helpful to families, people and families, but also in any business. Do they have a way of navigating the tough issues in order to engage in reality? It doesn't mean they have to get in fights. In fact, the question is can you engage in that stuff without just ending up in a fight? Can you talk about what's really going on and come out the other side and be able to move on?

**[00:30:30] RT:** My experiences, whether it'd be families – You spend more time with families than I do. But just a well-established management team. Meaning, they've been around together for a while. They develop a kind of quasi-family dynamic with a hierarchy.

I rarely find an individual level, much less a collective level, the skill capacity for them by themselves to manage difficult or courageous conversations. Is that your experience?

**[00:30:57] BP:** Oh, totally. This is one of those things that's the human condition. Most of us didn't grow up learning the stuff in our families. And there's a model called crucial conversations and they talk about either people tend to go to silence or violence. And by violence, they don't mean physical violence. But they mean angry, rhetoric, yelling, sort of verbal fighting. Or they withdraw. Like, those are the things most of us learned in our family's origin in difficult situations.

And we have a lot of reactivity that we bring with us into work. And the best teams I think have ways of getting beyond that. And it's never perfect. And it's not Pollyanna. But it's more functional. Can we grapple with things? And are we each taking ownership of responsibility for our own peace, if you will, or our own reactions, our own reactivity to understand and kind of take responsibility for that instead of essentially blaming each other?

**[00:31:56] RT:** So, in your work then – I'm assuming here. So, you clean up my assumption. That you can find yourself as being in the room with that dynamic happening and observing that there's no skill to have crucial or important conversations. Do you take that on as part of your work to begin to introduce that way of working together and then help them through it?

**[00:32:16] BP:** Yes. And this is one of the things where pattern recognition, or pointing things out, or sort of shining a light on things can really help. I mean, there's no magic wand. There are also great courses and great ways of putting this in front of people that is engaging and interesting. So, they sort of get onto their shared game, if you will. Like, "Oh, this is what we're doing here," where it feels like above the table, if you will. We're talking about X, Y and z. But we're playing ping-pong above the table, but below the table we're bowling.

And so, I think awareness changes things for all of us. And this is where having a model or a framework that helps shine a light on what's going on in a particular system is really helpful. And I come at this as a practitioner. Not around a certain theory. Although, I really believe in Kurt Lewin's idea that there's nothing so practical as a good theory. Because a good theory or model helps people understand their situation in a new way and then be able to take action that they couldn't take together before.

**[00:33:22] RT:** Okay.

**[00:33:22] BP:** That's also part of learning.

**[00:33:24] RT:** So, we've been in this conversation about these dynamics, and all the consequences associated with them, and the struggles, and the transitions, and the losses, and stuff like that. So, let's shift to focus a little bit here. You've been doing this long enough to see some successes, some progress, some breakthroughs in these kinds of dynamics that have led to something bigger than – Whatever that is. Talk a little bit about that other side of the process and what you've witnessed as what can come from this when these groups put in the work to travel this transition road.

**[00:33:54] BP:** Yeah, it's really satisfying and fulfilling to see a group, an organization. And it could be a board, or a management team, or a family group come out the other side of this. And really, the question is often in a transition, "What do we want to do together in the future?" That's really the question, right?

And so, the satisfying thing is that when people decide there's this cool thing we could do together. Let's build something new. Let's go after X, Y and Z. And people are able to show up and do that together. And it kind of releases a lot of energy, I would say.

There's a way in which when you go in a place that feels stuck, it's like this – I don't know where I first got this image. But it's like holding a beach ball underwater. And it takes a lot of energy to hold a beach ball underwater. Actually, takes a lot of energy to keep things stuck, when things are stuck. But then when you let it go, there's a splash. But then there's a lot of release of

energy. There's a lot more capacity available to do stuff together and to create things that are satisfying together and that contribute to the world.

And so, the world needs a lot of contributing, too. But I love the idea that – And different people put this forward in different ways. I think Joseph Campbell said a version of this. A theologian named Frederick Buechner. But it's kind of your job is to find what gives you great gladness and joy meets with what the world needs.

And so, the world needs a lot of things. And we can all get to contribute in our own way. But it's not about being a martyr. It's about what makes me alive and how do I match that up in some way with something that the world needs? And so, I think the real satisfying things are where you see people able to move past the things that had them stuck, or their big challenges they had to go through, or the crisis they had to go through. And people – Boy, during the pandemic, certain businesses thrived. But certain businesses really struggled out of no fault of their own. They were doing all the right things and the world changed. And were they able to adapt quickly enough or able to have the resources to adapt and survive and thrive?

But when you're able to see people come out the other side, you have a sense of they're happier and they're contributing in a way that – The happiest people are people in service of something bigger than themselves, I would think. That's not an original idea. But it's something that I just see over and over again.

We are meant to contribute in the world. And so, that future that people want to create together is very often about how are we contributing. And so, I often think of the kind of work that someone like me does is help people understand where they are and have a fresh perspective of it. And actually, people want to skip over that part and go straight to what do we want to do. But that sort of deep dive into really understanding where are we? How do we get here? And then where do we want to go? And then how do we close the gap? That's essentially what an outsider can help a firm do, or a family do or something.

But when you see people close that gap, there's this big energy release. And it brings on new problems and challenges. And so, the learning cycle has to go again, if you will. But we've all



worked in places that felt stuck. And we worked in, hopefully, places that felt more alive and like stuff was happening. And that's kind of what I'm listening for.

You could feel it at any particular meeting, for example. Somebody said to me one time, "Don't sit around talking about the future. Have a meeting where you're enacting the future." So, whatever it is that you're trying to create, do that in your meeting. That's how you start working towards the future that you want.

**[00:37:55] RT:** What a bloody novel concept. I think you and I probably share the same orientation as consultants, which is we want to work ourselves out of a job with regard to a particular client given what we're there to do and help them. Meaning, part of what we're up to is helping them actually build this capacity that we understand is essential for them to be able to do without us being there.

What is your your own transitional strategy when you're helping the client build this capacity that you've helped them design to close the gap from where they are in favor of the future? What's your strategy for being Bartless, if you want to say it that way? Because without that is part of – I'm thinking, without that as part of your own wiring for how the strategy, how you contribute to that new conversation, they could become dependent on you and you could get seduced to stay dependent on them for longer than you need. How do you deliberately think about that?

**[00:38:55] BP:** Well, absolutely. I think this is probably a place where I do a number of projects myself. But I love working with other people. So, to have more than one person, and to understand together, are we over-functioning? Are we doing things that the folks themselves should be doing?

I think it helps out front to lay out a process and to name what will be happening in different processes. And then along the way say, "Here, sort of keep reminding people." Revisit that map. Like, the map in the mall, you are here. Revisit, "Here's where we are. And here's what happens in this stage." And then it's not that people wouldn't need an external advisor for the next phase. But if you're still doing the same thing for a long period of time and nothing has changed and nothing is moved, then you're probably over-functioning for things that the system is dependent,

and you're dependent on the system, and they're dependent on you. And we're sort of stuck together.

**[00:39:53] RT:** Yeah. I might let you be an advisor to the listeners now rather than the kind of client you work with. I'm of a belief that we learn as much from our leadership or leading failures as we do our successes regardless of who we are and what we're up to professionally in the world. Would you share with people something that you learned from that didn't go well and how that's improved your craft?

**[00:40:21] BP:** Didn't go well for me?

**[00:40:23] RT:** Yeah, for you. And therefore, probably for the client as well. But it's changed the way in which you now go about doing what you're doing because of your hand and what it did that didn't go well.

**[00:40:33] BP:** Yeah, yeah. Certainly, one mistake I've made out of my excitement about working in a particular situation is to not be clear enough up front about contracting, and who's going to do what, and what the goals are and what we're really trying to do? And again, I would draw people to the book *Flawless Consulting* by Peter Block, where he makes a great distinction about the difference between what a consultant does and what someone inside an organization does. And being super clear up front about who does what.

I noticed, there have been times when really I was attracted to working in a particular place and I sort of let some things slide on the frontend and in a way that didn't position myself well enough. I mean, basically, I wanted the gig. So, I didn't say up front what I saw and what I thought would be needed to do it. Basically, I didn't speak up when I saw something. That's often a mistake I've made.

**[00:41:34] RT:** And that invariably comes back to get you, because the thing you didn't speak to is live in the system and it's bound to return later on.

**[00:41:42] BP:** That's right. Pay now or pay later. I mean, if it's not going to work, you're much better off to just say, "Here's what I really think would take to make this work." Is that something

you all want to do? And if it's not, it's fine. I mean, I don't think that I have the answer for what they should do. But I should say here's how I see this. Here's what I think's going on. Here's how I think I can help you.

And if they're not signing up for that up front, then fine. I could help them find the person who wants to do what they want to do. Often, this happens in a bigger organization where if the CEO is not on board for some major change, it's probably not going to happen.

And so, we've talked about leadership over the years. I like the idea that it's kind of doing what's needed at the time that it's needed. And that's not about positional authority. That can be about pulling people together. Getting something happening. And so, you can lead from the middle. But if there's a major change and the CEO is against it and the CEO needs to support it, you need to work on that up front.

**[00:42:50] RT:** Yeah. I subscribe to the distinction that Ron Heifetz makes, difference between authority and leading in organizations. Ideally, at the top, the authority figure is also doing the work of leading. But we all had experience being further down when a moment came for that and we looked up and it didn't show up. So, it's not inherent that authority equals leading.

When you put those two together, it's pretty potent stuff. Stuff moves in the system. Sometimes not for the best. But generally speaking, you can motivate and mobilize a lot of people by combining those.

So, we're kind of winding down here. I have two things left, unless you have something else, and you're free to do that. What is it I'm not asking you that I should be asking you?

**[00:43:36] BP:** I'm not sure. You and I've had a lot of great conversations over the years. There's a lot of things I want to ask you out of this. I love your work around swamp leaders and what that means. I'd be curious, for example, how you and the folks that you talk with think about leadership in times of transition or change, for example? When the external world's different, the inside of the organization is different, and there has to be some bringing things up to date or changing them. How do you think about leadership in that situation?

[00:44:12] **RT:** You're not supposed to ask me the hard questions, by the way.

[00:44:15] **BP:** Sorry. That's why I stopped.

[00:44:18] **RT:** It's a great question. And the first thing that comes up is I just realized this is why I had you on this podcast. Now, I can't claim that I knew that in advance the way I'm about to answer the question now. The purpose of the podcast is twofold. One is to get more voices on the record, if you will, to speak to from all sorts of different angles how it is you deal with hard, messy, wicked or swamp problems? And the family dynamic world you work in is certainly qualifies in that regard.

I was really keen because I knew your work, that you had a perspective on a kind of a point of view about that work that isn't being represented so far in the consolation of guests. Therefore, part of my answer is those people who've been on the show before should listen to this conversation because your specificity about in this important line that things can fall apart in the transition is not something we've covered in this conversation. And it should be part – Certainly part of the larger deal. But I'm going to point to a few people who have been before you to listen to this because your observation about that is spot on. And it's a thing that's challenging them. And we didn't cover that. We didn't distinguish that.

Part of the answer is I'm just building a mosaic, a collective wisdom here, and it's up to listeners to sort of figure out which parts they want to take. I also think that – And this is my last question. I view us, given we're of a certain age, as elders on a journey of leading and advising leaders. And there's a generations of people behind us on the trail. You're a hiker. And so, you understand that metaphor pretty well. What is it if they were listening to our conversation one or two things they might pick up that expedite their pace of developing their own leadership capacity? So, it's that two-pronged deal. And I think that this conversation has amplified a very specific element in the process of transition and change that hasn't been brought to fore right now. I'm just really grateful for you to have made the time to do that.

So, let me ask the question then. Or not question. What advice do you have for people who are behind us on the trail? From your perspective, life, you're a husband, you're a father, you're a

professional. What do you want to leave for these people to think about that they could benefit from based on your life and wisdom professional experience?

**[00:46:42] BP:** Well, I think having worked with a lot of people, and this is not a new idea, but I see it affirmed every day. That if you're going to be in a leadership role or you want to stand up and take leadership, make sure that you're getting feedback from people that you trust. Get a coach. Seek mentorship. Be sure that you're learning constantly.

And I think of learning as more than skill or knowledge development or an acquisition. But that's important. But this is really learning as reality-based feedback from the world in the situation that you're in. And I think that's the single most useful thing that people could do. And the world is trying to send you feedback. Are you listening? And there's been times when I was listening and times when I wasn't listening. I do better at the times I'm listening.

**[00:47:33] RT:** Do you have – And you mentioned journaling. Do you have any other specific structures or processes that you would recommend for people to cultivate that feedback beyond journaling, which is obviously a useful one in and of its own?

**[00:47:45] BP:** I do think having a coach. You could call it whatever you want. A coach, a mentor, someone to think out loud with and someone that will help you look at things in a different way and ask you questions you wouldn't have asked yourself. And to expand the circle of how you're seeing things. Because we all have blind spots. We all have things we don't know that we don't know. And those are the things that usually stall out people's careers.

Smart people, they don't get in trouble from some sort of basic lack of competence. They often get in trouble from some blind spot that they're not willing to take ownership of that often others around us see quite easily that we don't want to grapple with or deal with in some way.

And so, having a coach who is a thinking partner and is on your side. The value of a coach, you get some of this in good work settings. You also get reality-based feedback within the hierarchy that you work in or the team that you work in. And that's really valuable.

But the value of a coach or a mentor is that that person is just there to help you get better. They don't have some other dog in the fight. They don't have their own agenda that they're trying to enroll you in. They're just trying to help you. Again, that sense of where are you now? Where do you want to go? How do you close the gap?

And so, I think people who are – And there's research about this. People who are actively learning do better in their careers and accomplish more of what they want to accomplish in the world. Again, this is not a new idea. But I think it's worth repeating and I see it affirmed every day.

**[00:49:32] RT:** Great. All right, Mr. Parrot, thank you very much for coming into the swamp on what is a Friday afternoon for your time. It's been a pleasure. And I truly appreciate you being here, man. Good to see you too.

**[00:49:45] BP:** It's great to see you. I look forward to seeing you in-person. And thanks for having me on.

**[00:49:49] RT:** You're welcome. Thank you, man.

[OUTRO]

**[00:49:53] ANNOUNCER:** Thank you for listening to 10,000 Swamp Leaders with Rick Torseth. Please take this moment and hit subscribe to follow more leadership swamp conversations.

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