Chapter 4
Learning LEADS: A Lifelong Journey

> *The tallest tree in the forest is not the tallest just because it grew from the hardiest acorn; it is the tallest also because no other trees blocked its sunlight, the soil around it was deep and rich, no rabbit chewed through its bark as a sapling, and no lumberjack cut it down before it matured.*
>
> –Malcolm Gladwell [1]

The old adage "leaders are born, not made" is misguided. Our premise in developing the LEADS framework and writing this book is quite the opposite: we contend leadership can be learnt and developed. As Malcolm Gladwell points out in his book *Outlier*s (above) an individual must be nurtured in an environment that creates the conditions for success. In this chapter, we outline an approach where it's up to you, the leader, to create that nurturing environment for yourself. You are, after all, CEO of self!

Building on the genesis of LEADS over time, this chapter underscores leadership development as a life-long pursuit. Its purpose is to help create a bridge between the theory and the practice of leadership and to explain the activities we call "learning moments" for each domain.

The Approach

Most leaders develop their craft in the workplace, through experience. It's not an easy path: Mark Twain said "A man who swings a cat by its tail learns something he can learn in no other way." Many of us who've learned leadership on the job feel like that man: scratched and bitten, but knowledgeable and experienced.

The *LEADS in a Caring Environment* framework describes the capabilities needed to be an effective leader in health care. But knowing what those capabilities are and where they came from is only the first step. You'll be trying them out in the crucible of the real world. To keep you from getting discouraged as you do that, we're recommending you use *experiential learning*. Sometimes called *action learning*, it's a developmental approach that has groups of people work together on real

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issues, but in a structured way that encourages collective discussion and reflection so what happens is carefully considered and its impact studied to shape future activity.

Learning Leadership: Why It's Different from Learning Anything Else

Learning leadership differs from learning anything else in two important ways. The first is the tools of the craft. A hockey stick and skates are the tools of hockey. For rock music it's guitars and drums, a hammer and saw for carpentry.

But in leadership, your core attributes, values, beliefs and talents, are your tools. You can change superficial behaviour to influence others but—as we noted in Chap. 3—to truly be effective, your behaviour must be consonant with who you are. Kouzes and Posner [2] put it this way: "leadership is an art—a performing art—and the instrument is the self." You are the instrument; your growth as a leader is all about tuning yourself.

Learning leadership is also different because the setting for leadership is almost always fluid and unpredictable, and there are factors at play in dynamic settings that can make learning a challenge. Learning leadership must adapt to these factors:

- Leadership is situational;
- Effective leadership is in the eye of the follower;
- Experience is both practical and emotional;
- Growth happens through learning and unlearning;
- Learning leadership is a lifelong process.

Leadership Is Situational

What you as a leader must do always depends on the time, place and conditions of events, the nature and needs of the follower, and your own skills. What works in one instance may not work in another. Leaders need to be able to read the moment to decide what to do; they can't depend on a standard recipe. One concept of leadership—the contingency theory—reflects this perspective [3–5]. We think of it as a fact of leadership life.

Effective Leadership Is in the Eye of the Follower

It may seem paradoxical to say it in this book, but leadership is all about the followers. What works, and what doesn't, to influence them most effectively?

True leadership in health care is the ability to encourage, enable and empower others to do their work serving patients and citizens [6].[1] To do that, a leader must be in tune with those others, to influence them and shape the situation most effectively. And she must also be open to feedback on whether she was successful from the follower's perspective. This is not to say, however, that an individual is always a leader or always a follower. Consistent with our belief in distributed leadership, we believe the role of leader and follower can shift from person to person, depending on the situation, the circumstance, and the capabilities of the people involved.

Experience Is Both Practical and Emotional

Emotions are an important part of experience, but learning how to separate emotions from events and use emotions constructively is not easy. Dr. Sandy McIver, a colleague of ours, has helped create high-performance teams across North America—that is, teams capable of accomplishing high-quality work while finding the experience rewarding and enjoyable [7]. He recognized early in his work that most efforts at team building emphasized the logical and instrumental processes of effective teamwork, but downplayed the emotional aspect of it.

McIver calls that "emotion demotion." Downplaying or even refusing to acknowledge emotions in the belief logic and reason are all that matter ignores important aspects of the experience that need to be better understood. Leaders need to be conscious of, and reflect upon, the emotion in an experience and respond to it appropriately.

Growth Happens Through Learning and Unlearning

Chris Argyris, a professor at Harvard Business School is known for his work on learning organizations. He says both learning and unlearning are important for developing successfully [8]. According to him, learning is when you add new behaviour you need to be successful in a future endeavour, while unlearning is taking away behaviour that gets in the way of your effectiveness. His point, explained in a 1991 Harvard Business Review article called "Teaching Smart People to Learn" is that successful people are often not used to failure and have never learned from it. They have a tendency to let certain approaches become habitual because they have been proven over time to work for them. They are

[1] Jim Kouzes and Barry Posner, in their book *The Leadership Challenge*, define five qualities of effective leadership: Inspire a shared vision; Encourage the heart; Enable others to act; Model the way; and Challenge the process.

defensive when things go wrong, blaming other people or circumstances, but unable to admit they might have made mistakes. They are unconscious of these habits and can't see when they are getting in the way of responding effectively to new situations.[2]

Peter Senge [9] calls these habits mental models. He defines mental models as "deeply ingrained assumptions, generalizations, or even pictures or images that influence how we understand the world and how we take action. Very often, we are not consciously aware of our mental models, or the effects they have on our behaviour" [9]. Those unconscious mental models can lead to what he calls "the delusion of learning from experience," doing the same thing over and over, but not taking the time to plumb the experience for its natural lessons.

It's important to note that unlearning doesn't always mean forgetting and eliminating some capability or mental model. Unlearning is about bringing mental models or habitual behaviour into the open and recognizing when they are inappropriate [10].[3] Sometimes the habit is a constructive one, such as teaching, which is often, but not always, a good thing to do. However, some behaviour—like micro-managing, which really means taking power away from followers—should be flushed out permanently. Good and bad habits, as we know, can be addictive, and overcoming them can be as arduous as overcoming any other addiction.

Learning Leadership Is a Lifelong Process

In order to adapt to the various roles that we encounter during life, it's important to be constantly learning. What works when you are a clinician won't work as a CEO. And what works as a senior executive in a hospital does not necessarily work when you are on the board of a homeless person's society. At one point in your life you may be a citizen who wishes to lead change at the community level; in another, you might be a health-care provider who needs to "lead" a patient to taking greater responsibility for his own health. In each case, the knowledge and skills required to lead effectively is dictated by the role. Strategic change is important to the CEO. Knowledge of community power structures is helpful to the citizen leader. And empathy for the patient and the ability to communicate is fundamental to the health-care provider. Being able to grow and develop in order to meet the needs of all of these situations is lifelong learning.

[2] A movie devoted to this theme is Groundhog Day, starring Bill Murray. For an enjoyable and funny treatment of the need for both learning and unlearning, you are encouraged to watch it.

[3] In academic parlance "unlearning" is similar to meta-cognition. Meta-cognition is knowing about knowing; that is, the ability to know and understand—in this instance—the negative impact one's behaviour may have on one's leadership of others. However, meta-cognition does not have a second element of unlearning implicit in it: the ability to suppress and/or alter that behaviour.

One Way to Learn Leadership: The Hero's Journey

According to cultural anthropologist Joseph Campbell, in times of turbulence and confusion we often look to heroes to give us courage and hope. He defines the hero as "the champion not of things become but of things becoming….The dragon to be slain by him is precisely the monster of the status quo. The hero's task always has been and always will be to bring new life to a dying culture" [11]. We look to iconic figures who personify these qualities for inspiration: that is, to lead us to a better future.

Jim Kouzes and Barry Posner underscore this point [6]. They describe leadership as the ability of an ordinary person to rise to the challenge of situation and circumstance and do extraordinary things in response. Average people can demonstrate a heroic ability to inspire and encourage others: that's leadership. Sometimes leadership is charismatic and sometimes quiet and unassuming. But the result is the same: followers are empowered to act, rather than remain victims of circumstance.

There is deep appeal and power to mythology such as the hero's journey. Webster's dictionary describes a myth as a "traditional, typically ancient story dealing with supernatural beings, ancestors, or heroes that serves as a fundamental type in the worldview of a people, as by explaining aspects of the natural world or delineating the psychology, customs, or ideals of society." Campbell called the hero's journey a mono-myth: a repeating pattern of cultural stories that express the worldviews of many societies, and that underpin our instinctive way of understanding the challenge of experiential learning in order to become a better person.

In his book *The Hero of a Thousand Faces*, Campbell describes the hero's journey [11].[4] The title reflects the numerous examples, in many cultures, of how an ordinary person can be transformed into a leader by experience. In Herman Hesse's *Siddhartha*, the central character decides he must venture away from his accustomed life and go on a journey to attain spiritual enlightenment. In Homer's Iliad, Ulysses is transformed by his experiences.

George Lucas's deliberate use of the archetype of the hero's journey in the *Star Wars* movies is well documented. Dorothy, in the *Wizard of Oz*, undertakes her own hero's journey. There are also many true examples: Nelson Mandela's transition from insurrectionist to president personifies the hero's journey.

Figure 4.1 shows the journey as a series of experiences that ultimately lead to personal growth and transformation [12]:

1. *The call to adventure: innocence lost.* Experiential learning, like a hero's journey, begins with the leader in a state of unconscious innocence—chugging along comfortably in his role. But something happens—for example, a new

[4] Indeed, some critics have interpreted the use of the term hero in the title as implying only special individuals can lead; and that the concept seems to support the "great man" theory of leadership. However, we interpret the title as saying the exact opposite: that there are thousands of heroes, and the ability to be heroic resides in all of us. And the way to realize that potential is to recognize the power of experiential learning, as represented by the hero's journey, and to make it the discipline we employ to grow our leadership capability.

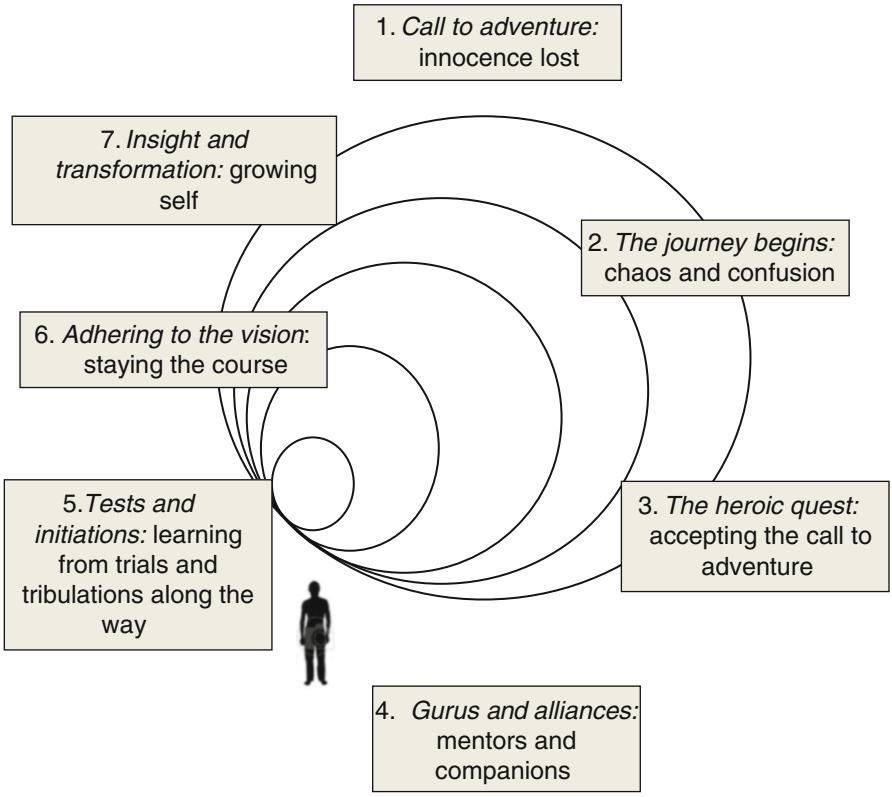

Fig. 4.1 The hero's journey of experiential learning [12]

government policy, a relationship that goes off the rails, or restructuring—that disturbs that innocence, and thrusts the leader into an adventure (desired or not). A journey that will bring about change is afoot.

2. *The journey begins: chaos and confusion.* What happened? What do I do now? How do I cope? Do I just hunker down and wait out the change? Do I like the change? Why can't we just go back to the old way? The Sufi poet Rumi has a metaphor for attempts to recapture what once was but has gone: "There is no use in [wine] trying to become a grape again." Sometimes the individual resists the call, at least initially. Finding a way out of chaos and confusion seems daunting—and the way forward is anything but clear.
3. *The heroic quest: accepting the call to adventure*. This is crucial. The leader must choose between remaining awash in confusion and inaction, hoping the situation will resolve itself; or taking the initiative to act. To take initiative is to lead. To remain a victim is to follow. The desire to take initiative may come from some insight, sheer will or deep-seated frustration. This is not to say that the leader knows what to do and how to do it; but she is willing to act—to begin a journey to a more desirable future state. This is the essence of leadership; and in

the case of experiential learning, the step at which the leader chooses to learn or unlearn, as the case may be.

4. *Gurus and alliances: mentors and companions.* In almost all hero's journey myths, the protagonist cannot learn or lead alone. Along the journey, she meets others who provide her with guidance, insight, and friendship—and who share the goal of the journey with her (such as the Tin Man, the Lion, and the Scarecrow from the Wizard of Oz). In leadership, your companion may be a buddy from the office, a team member, such as a peer with skills you don't have, or an expert who can mentor you along the way. Leaders do not lead—or learn—alone and you should be prepared to include it in your experiential learning.
5. *Tests and initiations: learning from trials and tribulations along the way.* Not everyone will share your vision and goal. Some resist, some don't understand, some don't have the energy to change. Sometimes leaders have enemies who oppose what they're trying to do. At other times they face obstacles, perhaps policy, practice or culture that are antithetical to their vision. But, as the saying goes, "what doesn't kill you makes you stronger." Learning from experience means accepting that difficulties create opportunities with the greatest potential for insight—if you are open to them and take time to reflect on them.
6. *Adhering to the vision: staying the course.* Many leaders abandon their vision, perhaps exhausted by the effort of achieving it. Leaders—and experiential learners—need to be resilient. An old Chinese proverb says "a leader is someone who is knocked down seven times and gets up eight." So it is with learning leadership: it is a lifelong endeavour. The good news is that if you are open to learning throughout the journey, your leadership skills will be profound later in life. The bad news is many of us abandon learning too early in our career. Learners and leaders must stay the course to realize their learning potential.
7. *Insight and transformation: growing capacity.* The ultimate benefit of going on a leadership journey is returning home again, but enriched from your experiences. For an experiential learner, that result is personal insight and knowledge of practices that will make you the leader you want to be. The previous steps prepare you for transformation into the leader you want to be; the trick here is to retain the wisdom you have gained, integrate it into your practice, and share it with the rest of the world.

We're using the hero's journey as a metaphor for experiential learning, but also to show the adventure and risk in setting out on a learning journey. Adventure has no certain outcome or pre-determined path. If it did, it would be a plan, not an adventure. T.S. Eliot, in his poem *The Wasteland*, suggests hero's journeys (plural) are the stuff of life, and as long as one is open to opportunity, never over: rather, something destined to renew itself in ever-increasing opportunities for fulfilment and enlightenment:

We shall not cease from exploration
And the end of all our exploring
Will be to arrive where we started
And know the place for the first time.

We encourage the readers of this book to see their leadership learning journey in the spirit of opportunity, adventure and exploration, ultimately to be realized as personal fulfillment as a leader.

Experiential Learning and Leadership

A second way to think about learning leadership in the workplace comes from experiential or action learning. Experiential learning helps us to:

- Make sense of the chaos and confusion of changing experiences that are natural and confusing.
- Reduce the unknown elements of change to a comprehensible level.
- Develop ways to determine how to respond to and interact with changing internal and external environments; and
- Define our personal space in change and our individual view of the context in which we are being asked to change [13].

These are not new concepts and have been written about by many scholars over the past 50 years [14, 15] but there are particular nuances when it comes to learning leadership [16, 17].

Many interpretations of experiential learning are reflected in David Kolb's work [18]. Marilyn Taylor subsequently characterized learning as a continuous process of disorientation, exploration, reorientation and equilibrium. It's a cycle and the desired state is multiple loops through the cycle. The cycle is pictured in Fig. 4.2.

Let's explore experiential learning further in this story:

Gerry, vice-president of strategic planning at a large health authority got a call from Marilynn, a colleague in another department, who had once been a student of Gerry's when he was guest faculty at a master's program at a local university. She called him because she was struggling with an issue and wanted to discuss it.

The next morning the two met at Starbuck's. After a few pleasantries, Marilynn laid out her issue: she was struggling with her supervisor Barbara, who travelled regularly, and was always so busy when she was there Marilynn could not get decisions on very important, time-sensitive issues.

Gerry said to Marilynn, "Well, if it were me, I would go to her executive assistant and book a meeting. They always control their boss's agenda. Or you might try to button-hole her at lunch time when she's leaving the office."

Marilynn grimaced and said, "Well, the executive assistant approach won't work. Diane is very protective of her boss and won't schedule meetings for direct reports unless she asks Barbara first…that's been part of the problem. And as for the lunch idea, Barbara always brings her lunch, and prides herself on working through lunch."

Gerry tried a second time. "Why don't you hang around Barbara's office before she comes in, and try to intercept her then?"

Marilynn shrugged. "You never know when Barbara comes to work. Half the time she's dropping her kid off at school; the other half she's at a meeting with some stakeholder group or at an off-site function. That's part of the problem. We never know her schedule."

Gerry, ever helpful, tried again. "Why don't you send her an email, saying it's really important you meet with her, and ask her to suggest a time?"

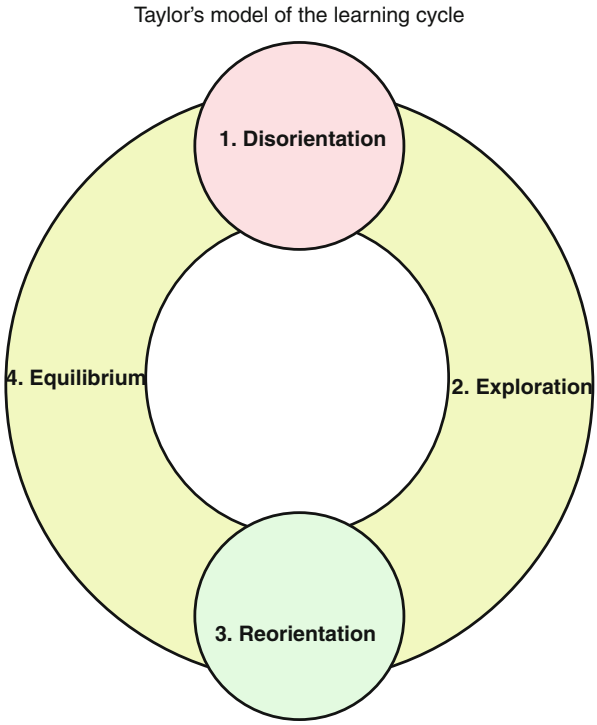

Fig. 4.2 Marilyn Taylor's model of experiential learning [19]

"Goodness", said Marilynn, with a touch of asperity in her voice. "You don't think I've tried that? That was the first thing I did."

"Well", said Gerry, "Do you want me to talk to Barbara?" He could see that Marilynn was becoming distressed and wondered what he had done. After all, he was just trying to help.

"NO!" Marilynn said, clearly annoyed. "That would be the worst thing you could do". She picked up her purse and plunked a couple of dollars down on the table. "Thanks for the coffee, Gerry" she said. "I'll figure something out. Much appreciated." She walked away, clearly distraught.

Gerry walked back to his office, puzzled by how the conversation had gone so wrong. He knew he and Marilynn respected each other and he hadn't expected such a reaction to his advice. When he got back to his desk he pondered the discussion. "What did I do?" he wondered. He reflected on their conversation, contemplating his suggestions and Marilynn's responses. He had suggested several solutions but Marilynn responded more negatively to each one. "What's that about?" he wondered.

Then he remembered a lesson he had taught in his master's program—about the difference between teaching and coaching. He pulled out the LEADS framework and quickly reviewed the Engage Others domain. Under Communicates Effectively, he read: "They listen well and encourage open exchange."

Suddenly it came to him. He realized that he had been teaching, not listening. "For Pete's sake", he said, talking aloud. "There was no open exchange…and I didn't listen," Gerry said to himself. "I did all the talking—I was teaching! And of course I was, that's my background (Gerry had been a teacher for ten years prior to changing his profession). It's what I do well…but she needed coaching!"

He turned to his computer and Googled coaching for improvement. He read through the steps: 1. Define the performance problem. 2. Invite the employee into the discussion.

3. Listen closely so you can understand the employee's perspective on the situation. 4. As needed, explore possible causes…together.

When he reviewed the conversation, Gerry realized that he had fallen into his tried and true practice of being the expert with all the answers, which was particularly easy to do with a former student. He had forgotten that she had moved on to be an expert in her own right, and needed coaching, not teaching. The essence of coaching—asking questions, on the assumption the individual has the answer within them and just needs to discover it—was completely at odds with his approach. Gerry was frustrated at himself for not recognizing his "mental model" but decided to correct the oversight.

He called Marilynn and asked to meet again the next day over lunch—his treat. He promised that he would like to give it another go, if she was up for it. Marilynn agreed cautiously. That evening, Gerry reviewed some of the resources he had on coaching, and devised a coaching approach, including preparing himself to recognize the signs of the teacher in him coming to the fore.

At lunch the next day, with Gerry in coaching mode, both discovered Marilynn did have an idea for a solution—putting the issue in a briefing note, with a request it be discussed at the next management meeting. Apparently Barbara liked to use briefing notes to structure her management meetings—which Gerry did not know and would never have suggested.

This a story of learning by experience (with a little help from LEADS and Dr. Google). In it, Gerry learns the importance of including the knowledge and skills of coaching among his leadership tools, and he unlearns his natural urge to teach, rather than coach. Let's look at how it follows Taylor's cycle of experiential learning.

The cycle begins with an experience, Gerry's initial conversation with Marilynn. This is a unique situation because the dynamics between Gerry and Marilynn are different from other relationships and the circumstances she was talking about were different in context, events and personalities from any others. Gerry and Marilynn each understood that experience, identified in Taylor's model as the disorientation step, differently. Gerry provided advice, which Marilynn had already considered. Marilynn became annoyed, frustrated and despite Gerry's good intentions she was left with no solution. This is the innocence lost period of a hero's journey and both were clearly disoriented due to the exchange.

The next step is Gerry's reflection on the event. This is the exploration step of the Taylor model. He played the experience over in his mind, wondering why Marilynn had reacted as she did. He parsed out his actions (Marilynn's growing negative reactions and no effort by him to find out what Marilynn had already done or not done). His reflections show the importance of recognizing the emotions of both people, because the experience is not defined not just by what occurred but Marilyn's emotional reaction. In fact, her emotions triggered Gerry's desire to reflect on the situation, and to learn. We need to note that his reflections led him to wonder what he could have done better and led to his insight that he had been teaching rather than coaching. This is the "chaos and confusion" stage of the hero's journey.

In keeping with the third step in Taylor's learning cycle, Gerry reoriented his thinking and decided to act differently (coaching instead of teaching). In the hero's journey, this step is the "heroic quest." He decided to try again to meet Marilynn's needs. He turned to the literature to clarify how teaching and coaching differ. This is the "searching out gurus and alliances" stage in the hero's journey. Then he planned the conversation he would have with Marilynn—not only what he would do

to craft questions, listen to responses and be in the moment with her—but also what he would do to suppress his natural tendency to act as a teacher.

Finally, in step four, Gerry and Marilynn initiated a new action—in which Gerry practiced the skills of coaching with her. This restored some equilibrium to the relationship (Taylor's fourth step). This is the "tests and initiation" stage of the hero's journey. In this conversation he asked questions to establish what Marilynn had already done and about Barbara's management style and how she made decisions. He listened and asked probing questions, such as: When you've been successful in getting Barbara's attention in the past, what worked? What likely made it work? How did what you did fit into Barbara's preferred management style? If you were to follow a similar pattern in this instance, what would it look like? Rather than give advice, he inquired to understand, using a principle of Stephen Covey's —"seek first to understand, then to be understood" [20].

Gerry also kept himself consistently aware of his natural desire to leap in and provide advice, and suppressed it. He had to or relive the dynamics of the conversation the day before. This is the "staying the course" stage on the hero's journey. It was clear from the conversation that Marilynn already knew the solution; she just had to be reminded of what she knew, and take ownership of it.

Later Gerry reflected on the successful second meeting with Marilynn, getting the insight he needed for transformation. If, however, the conversation had not worked, Gerry would have had to go through the cycle again, to parse out the dynamics of the situation and what he might do differently to achieve a positive result.

A Discipline to Learn Leadership

Integrating the experiential learning cycle and the hero's journey led us to these top ten guidelines for learning leadership in the workplace:

- Look for the leadership opportunity in any situation.
- If that situation feels chaotic, confusing, or perplexing to you—and you are uncomfortable with the result—it represents an opportunity to learn (or unlearn).
- Reflect on the situation to make sense of it: what do the people I am trying to lead need from me that they are not getting? What did I do to contribute to the confusion?
- Use what you've learned this time to set a goal for personal improvement—what aspect of your behaviour do you need to change?
- Enlist others you trust (it could be colleagues, mentors or writers) to support and guide you as you learn.
- Practice your desired behaviour in the workplace. Look for situations where you can test yourself.
- Gather feedback on your effort, then reflect on what you heard. What insights have you gained? Were you successful? Why? Why not?

- Transform your behaviour by adding a new behaviour, or figuring out how to unlearn habitual practices and mental models that aren't constructive.
- Find time for ongoing, systematic self reflection.
- In the spirit of lifelong learning, start again.

You can apply these guidelines for learning leadership in the workplace in three contexts. The first context is completely informal; you simply choose to employ the guidelines and take care to integrate their ideas in your day-to-day work. You can try a mixed formal and informal approach, perhaps by enrolling in a leadership program and using the guidelines to apply what you learn at work. The third context is decidedly formal, by creating an organizational policy requiring leaders to get formal training, document it and show evidence of growth and success. Try all three!

Note too that the learning opportunity was enhanced by access to learning resources: the LEADS framework itself, and Dr. Google that provided needed knowledge on the difference between teaching and coaching. In keeping with the hero's journey metaphor, learning resources such as those are brought along in your backpack for the journey.

This book is one of those resources, and the many tools, techniques and approaches highlighted in the chapters on LEADS can also assist you in learning.

Conclusions

In this chapter we've discussed the significant evidence that leadership can be learned and developed, like music or athletic ability, through acquiring skills and knowledge and practising; and there is a discipline for doing that. Warren Bennis, a professor at the University of Southern California, once said that leadership cannot be taught, but it can be learned [21]. He recognized the discipline needed for success in leadership depends on the will and commitment of people who want to increase their leadership capacity. Consistently striving to be better is a life-long pursuit.

You won't learn leadership from a single training program or an individual event. Malcolm Gladwell, in his book *Outliers,* suggests to be truly proficient is a matter of practicing a specific task for a total of around 10,000 h [1]. Successful leaders use experiential learning for ongoing development, because it lets them see recurring patterns of experience and understand what works and what doesn't.

In the spirit of this chapter the remainder of the book will employ three primary strategies to assist the reader to learn from experience. First, a few select stories will be used to simulate the various capabilities of the LEADS in a Caring Environment capabilities framework. Second, in sections called "Learning Moments" questions will be posed to provide you with opportunities to reflect on your leadership capability. Some suggestions as to how to practice a particular capability in the workplace are provided. Each chapter will then end with a self-assessment on the LEADS

domain to engender another round of learning. We now invite you to embrace the opportunities to learn that the workplace provides for you and to use LEADS as a guide. And that takes us to the first of the LEADS capabilities: Lead Self.

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