

Fundamental #1: **Do what's best for the client.** In all situations, act in the best interests of our client, even if it's to our own detriment. Our reputation for integrity is one of our greatest assets.

Could there be a more fundamental principle than this? It certainly makes decision-making easier. When you're not sure, just do whatever is best for the client. Here's the interesting thing I've learned. If you always do what's best for the client, you're rewarded many times over during the course of your career. However, this doesn't mean that we'll always be better off in each individual instance. For example, when we show a client how to reduce their cost, we're also reducing our commissions. When we move them to a carrier with a lower commission scale, we're reducing our earnings. And yet, if this is the right thing for them, we must ALWAYS do it. Reputations are built by steadfast adherence to core principles, regardless of the result.

Fundamental #2: **Check the ego at the door.** Our own egos and personal agendas must never take precedence over doing what's best for the team. Being concerned with who gets credit, who looks good, and who looks bad, is counter-productive. Making the best decision for the good of the enterprise must always be paramount.

In my observation, at the core of every dysfunctional organization is one thing: ego. When the organizational culture promotes posturing, jockeying for position, vying for credit, and political maneuvering, success is nothing more than a lucky accident. Conversely, when we submerge our egos to the overall good of the organization, when we focus our efforts and decision-making on what will help the organization prosper, success is a natural result.

Learning to evaluate ideas on their intellectual merit rather than on whose idea it was, learning to seek honest feedback in order to grow without being consumed by threats to our self-concept, learning to ask for help from others rather than being a martyr, and learning to admit mistakes and change direction when new information is presented are all examples of what it means to "check the ego at the door." Here's the real key question: Are our actions primarily designed to forward organizational success or are they designed to serve our own egos? Our primary driver must always be organizational success.

Fundamental #3: **Practice A+ness as a way of life.** Regard everything you touch as a personal statement bearing your signature. Take pride in the quality of what you produce, for excellence matters as a deeply personal value in and of itself, well beyond the probable business result of such excellence.

There are two key points I want you to understand here: what is A+ness and why is it so important? A+ness refers to the habit of making sure that everything you do is of the highest quality. It means making sure that a document you print is accurate and neat. It means that we don't use poor photocopies printed at an angle. It means that when we

walk into a meeting, we're fully prepared and well-organized. It means that the advice we give is the best and most thorough we can offer. While it includes a focus on details, it's much broader than that. A+ness is really about demonstrating a personal pride in the quality of our work.

Here's the other point I want you to remember: The reason to do A+ work is not because we'll sell more business or because our clients will like us more or because we'll build a better reputation or even because we'll be more profitable. While these are likely results, they're not the reason. The reason to do A+ work is because it matters to each of us as a personal value statement. Deep in our hearts, we take great pride in knowing we've done our best. In many ways, our work product is a symbol of who we are and what we value. Make sure that your work is a demonstration of the best you have to offer the world.

Fundamental #4: **Take the extra time to do things right the first time.** Don't take shortcuts. The goal is to get things "right," not simply to get things "done."

This is a principle that requires discipline and will more than anything else. Each of us is often tempted to take shortcuts, to want to be done with a task as quickly as we can. While speed and a sense of urgency are clearly important, the most important thing is to do each task well. In fact, slowing down enough to do it right the first time often saves time in the end.

Taking one extra day to "scrub" enrollments for completeness before forwarding to a carrier can actually save days on the back end by reducing the number of errors we ultimately have to fix. Taking the extra time to proofread and double check our calculations can prevent costly and embarrassing mistakes. Even in our communications, taking the extra time to push for greater clarity can reduce the wasted time and effort often caused by misunderstanding.

Discipline yourself to slow down and get it right the first time.

Fundamental #5: **Seek to create win/win solutions.** Learn to think from others' perspective. Discover what others need and find solutions that meet their needs while still fulfilling our own. Win/win solutions are always longer lasting and more satisfying than win/lose solutions.

The operative words here are "seek" and "create." Win/win solutions aren't always obvious; rather, they require a certain amount of "seeking" and "creating." They also require a degree of selflessness - a curiosity about others and their needs. To develop a true win/win, we must put ourselves in the position of another and understand what they need. Then we can be creative about getting them what they require while also meeting our own objectives.

Simply asking for or demanding what we want, without regard for another's perspective, is a short-term solution at best. If the other side is left feeling incomplete or dissatisfied, or worse yet, taken advantage of, then the solution is truly not viable long-term. This is true whether we're talking about client relationships, carrier relationships, employer relationships, or even personal ones.

Figure out a way for us both to get what we want and you'll have two people equally committed to making it work.

Fundamental #6: **Practice blameless problem solving.** Treat mistakes as learning opportunities. Focus on the following questions: What are our best options to solve the problem? What have we learned that can help keep us from repeating the mistake? How will we integrate that learning into new behaviors or practices?

In my observation, when a problem occurs most people's first response is to defend themselves by pointing out all the reasons why it wasn't their fault. Of course, this is a natural response in anticipation of being blamed. And yet, while we're busy making explanations and excuses, we're neither fixing the problem nor learning anything useful.

Eliminating blame from the equation frees us to focus on the important issues: solving the problem and learning. We want to first apply our energies to solving the problem. What are our potential solutions and which will work best? With the problem fixed, we then want to examine what we've learned that can help us prevent a repeat of the issue.

But there's one more critical step to complete the picture. It's one thing to learn, it's another to *integrate* that learning. We must also ask ourselves how we will put this new learning into action. How will our actual behavior be different to reflect this learning? Problems present us with opportunities to gain wisdom. But wisdom is only useful to the extent we apply it.

Fundamental #7: **Make decisions that reflect a reverence for long-term relationships.** Our primary goal is the long-term success of the enterprise. We must view all of our decisions and actions from this light.

While we always want to have a sense of urgency about accomplishing our objectives *now*, we must never sacrifice long-term success for purely short-term rewards. As we make decisions, we need to do so in the context of what will help us to be successful over the long run. This is particularly true when it comes to our relationships.

Whether we're dealing with clients, vendors, or fellow employees, we must invest the time, energy, and care to build relationships; for these relationships are a cornerstone of our success. Our decisions should honor and strengthen these relationships.

Fundamental #8: **Maintain a solution orientation rather than a problem orientation.** Focusing on problems drains energy. Apply your creativity, spirit, and enthusiasm toward the development of solutions.

This principle sounds easy, yet is remarkably difficult. For some reason, most of us (myself included) at times love to commiserate or to indignantly describe how we were mistreated or wronged. The more preposterous the mistreatment, the more justified we feel in our complaint. But is this helpful?

While acknowledging the problem in order to better understand its components can be useful, simply wallowing in frustration obviously is not. We must put the bulk of our energy, our thinking ability, and our creativity into developing solutions. We will generally find what we're looking for in life. If our attention is primarily oriented toward the problem, solutions tend to remain hidden or obscured. When we learn to focus our attention on solutions, a myriad of possibilities inevitably appear. Be a solution-seeker, not a problem-dweller.

Fundamental #9: **Work from the assumption that people are good, fair, and honest.** Kindness begets more kindness. Trust begets more trust. We believe that most people genuinely want to do the right thing. Act out of this belief.

If I have a favorite one, this may be it. I can't emphasize strongly enough how much our perspective influences our interactions and our results. If we begin our conversation from a point of view that the other person is trying to cheat us or take advantage of us, the chances of a positive interaction are dramatically reduced.

Conversely, if we begin each conversation with an assumption of positive intent, with the belief that the other person is "good, fair, and honest," then we are far more likely to be able to create mutually acceptable results.

What we assume and expect about people absolutely affects their behavior. Let's assume and expect the best.

A handwritten signature in black ink that reads "David". The letters are cursive and fluid, with a large initial 'D'.

Fundamental #10: **Keep things fun.** The world has much larger problems than our own. Be light-hearted and smile.

While it may sound trite, this core value is as important as all the previous ones. I say this for two reasons. First, we spend too many of our waking hours at work or in work-

related activities to not have fun. While, of course, we all have our stress points, our work life should mostly be one that we genuinely enjoy and that helps us to be happy. Otherwise, it's simply not worth doing.

Second, given how seriously we take our commitment to solving customer problems, it can be easy to lose perspective. It's easy to allow work problems or frustrations to dominate our thinking. We need to do everything we can to help, but at the end of the day, we must be able to live our lives with a sense of balance and perspective. How many of the daily challenges we face are true life and death issues? There's nothing like a real belly laugh or an uncontrollable case of the giggles to cure us of taking ourselves too seriously. Take time out to smile and laugh.

Fundamental #11: **Create a feeling of warmth and friendliness in every client interaction.** Every time you touch a client you're on stage. This includes calls, visits, voicemail, letters, e-mails, and other communications. Make dealing with you an extraordinary and memorable experience.

When people deal with us, they don't know or care about our reputation, our culture, our strategy, or our values. The only thing that's "real" for them is the current experience they have with us. Amaze them with your helpfulness. Surprise them with your friendliness. Delight them with your warmth. Cause them to look forward to their next opportunity to connect with you. Make the experience one that prompts them to tell stories about how wonderfully they were treated.

Be aware that you're creating a feeling even in your "one-way" communications. Your daily voicemail greeting creates a sense of your style and sets an expectation for callers. It should leave callers eagerly looking forward to talking with such a friendly person. Even the words and sentence structure you use in a letter or e-mail create a feel or a mood. Make sure the mood is one of warmth and accessibility.

Use EVERY opportunity to exude friendliness. This is an important piece of what sets RSI apart.

Fundamental #12: **Practice the "Human Touch."** Treat people as individuals and show them you care. Look for opportunities to acknowledge their uniqueness and their humanness (calls, cards, notes, gifts, etc.).

At the heart of every great customer service story is the experience of being treated as an individual. Each of us wants to be recognized for our uniqueness, for our personal value. Unfortunately, in most of our dealings we feel "processed," like an inanimate object of a transaction. Think of how we feel on most airline flights – from the way we check bags,

to the way we go through security, to the way we board, to the way we are given safety instructions. Rarely do we feel cared for as an individual, and yet we crave this feeling.

At RSI, we must be different. Look for every chance you can to show that you really do care. Remember people's names. Take note of and remember their interests, their family situation, their concerns. Send them personal, hand-written notes. Send them a book or gift that you know will be meaningful. Call them to check on their health if you know they needed care. Be a friendly person they can connect with on a human level. Make dealing with RSI a pleasant respite from the normal experiences people have with most vendors.

There is no substitute for being genuine.

Fundamental #13: **Communicate to be understood.** Know your audience. Write and speak in a way that they can understand. Use the simplest possible explanations.

The whole point of communication is for people to understand each other. So why do people write using words that others cannot understand and why do speakers insist on using language that is particular to their own industry or even their own company? Sadly, I believe the answer is selfishness – a focus on ourselves and our agenda versus the audience and their needs. Learn to focus on your audience.

This is true whether we're writing a letter or an e-mail, or whether we're speaking to one person or a large group of people. Use simple words that people can understand. Refrain from using industry jargon if at all possible, and if absolutely necessary, define your terms first. The goal is never to impress others with your "brilliance," for this serves only your own ego (remember Fundamental #2 – check your ego at the door). Rather, the goal is for others to understand both the content and the feeling in what you're trying to convey.

Among the highest compliments you can receive is when someone says, "I never understood it so clearly before."

Fundamental #14: **Set and ask for expectations.** We judge situations not by what happens, but by how they compare to what we expected to happen. Learn to create mutually understood expectations in every situation.

It's Monday morning and two clients call with questions about claims. You promise to look into the questions and get back to them as quickly as possible. By Wednesday morning, you proudly call both clients back with answers. The first client is thrilled with the fast response time, for they thought it would take weeks to resolve. The second client, however, is upset because they were expecting an answer by Tuesday. It's the same situation and your response was the same, but the client reaction was completely different. Why? Expectations.

Each client judged the response time according to their own set of expectations. The issue is not whether resolving the problem by Wednesday was good; rather, the issue is how the response time compared to what they were expecting.

We have expectations for everything, whether we've consciously thought of them or not. We have expectations for reading this e-mail, for how our next meal will taste, for what will happen at work today, for how a phone conversation will go tonight, for every incident and interaction we have . . . and we constantly compare reality to our expectations.

Recognizing this, what could be more important in both business and interpersonal relationships than making sure we set and understand expectations? Learn to discuss and establish mutual expectations in every interaction and you're on your way to eliminating the single most important cause of dissatisfaction.

Fundamental #15: **Make voicemail a valuable tool.** Your voicemail greeting is an important opportunity to set expectations and create a mood. Update voicemail daily and create a warm, friendly style that makes callers want to speak with you.

This Fundamental is a great opportunity to apply and practice two previous Fundamentals (#11 and #14).

In Fundamental #11, I talked about the importance of “creating a feeling of warmth and friendliness in every client interaction.” Think of your voicemail greeting as an interaction. When someone calls and listens to your message, it's as if they're speaking with you. What feeling are they getting from the conversation? Is it one that makes them feel cared for? One that makes them look forward to speaking with you? One that gives them a glimpse into your personality? Smile as you record your greeting and picture the person who's listening to you. Create a personal connection with your listeners.

In Fundamental #14, I explained why it's so critical to “set and ask for expectations.” Your voicemail greeting is a powerful expectation-setting tool. If I leave you a message and your voicemail greeting never changes, I have no idea whether you're in or out, when you'll get the message, and most importantly, when I should expect your return call. Conversely, if I leave you a message and you update your voicemail greeting daily, letting callers know your schedule and your availability for return calls, then I know what to expect in terms of response time. Since I'm going to judge you not by what happens, but by how it compares to what I expected to happen, you can see how critical it is to use your daily voicemail greeting wisely.

Make your voicemail a valuable tool.

Fundamental #16: **Follow-up everything.** Internal and external clients rely on us and we rely on others. Record a follow-up date for every action and take responsibility for its completion.

In today's interdependent world, there are few things we can accomplish that don't involve reliance on others. This is especially true for businesses like ours where we act as "middlemen," interceding on behalf of our clients to solve problems with insurance companies. Here's the problem: too often we're told an issue is resolved and pass this answer to our client, only to learn later that it was not, in fact, ever completed as promised. So what can we do?

Follow-up everything. People count on us for results, not for effort. We must be in the habit of double-checking to be sure that what was promised has actually been completed. If a person was to be enrolled today, check tomorrow to be sure it was done. If a claim is to be paid by Wednesday, call Thursday to be certain it was completed. If an ID card was to be mailed by Tuesday, call Friday to see that it arrived.

Sometimes I'll hear the frustration that "we shouldn't have to check to be sure that promises are kept. It's such a waste of valuable time." While I agree that it's a shame to have to spend our time this way, whether we should or shouldn't have to is truly irrelevant. The reality is that if we are to take responsibility for seeing that issues are resolved, we MUST be rigorous and unrelenting in our follow-up. Make this a habit and watch your effectiveness grow.

Fundamental #17: **Be punctual.** Be on time for all appointments, phone calls, meetings, and promises. How you relate to time sends a message about how you relate to other commitments. Punctuality is a reflection of respect for others.

When we have an appointment, whether that appointment is a group meeting, an individual meeting, or a phone call, we've entered into a commitment with someone else. Honoring our commitments, therefore, requires us to be on time. When we're on time, we show the world that we're serious about fulfilling our commitments. Conversely, sloppiness about being on time reflects a sloppiness or lackadaisical attitude about commitments in general.

Beyond the relationship between punctuality and commitment is the fundamental issue of courtesy. Being on time shows other people that you value and respect them. It shows that you consider their time to be important.

I sometimes hear people dismiss occasional tardiness by saying that they're "usually" or "often" punctual. The problem with punctuality being less than "always" is that I don't know in advance whether this is one of those situations where you will be on time or one where you won't be. It goes back to expectations (Fundamental #14). Unless you're always on time, I simply don't know what to expect.

Work to make punctuality an unwavering part of how you operate.

Fundamental #18: **Listen generously.** Learn to listen for the contribution in each other's speaking versus listening from our assessment, opinions, and judgments.

This is the first of five Fundamentals that encompass the core practices of The Collaborative Way. It is truly amazing to witness the impact that the perspective from which we listen has on situations. How often do we listen believing that we already know the answer? How often do we listen judging to see whether or not we agree with the speaker? How often do we listen already convinced that we know what's "really" happening?

Listening generously is more than just listening objectively. Much like working from the assumption that people are good, fair, and honest (Fundamental #9), listening generously implies that we're assuming positive intent. We're looking for the most positive way to hear another person. We're looking for the contribution to our own thinking or understanding that the speaker can offer.

I once heard listening generously described as listening with a willingness to be convinced. We literally are willing to change our point of view based on what we hear, versus listening to be polite or to allow someone simply to "have their say." When we truly open our minds to receiving new information without a rigidly predetermined bias, amazing new pathways for action become available that we would never have been able to see before.

Listening generously is perhaps the most easily overlooked practice in The Collaborative Way, and yet it's also easily the most powerful. Open yourself to listening generously and watch what happens.

Fundamental #19: **Speak straight.** Speak honestly in a way that forwards what we are up to. Make clear and direct requests. Be willing to surface ideas or take positions that may result in conflict when it's necessary to reach our objectives.

This is the second of the Collaborative Way practices and is the one that I observe people struggle with the most. So what is "speaking straight" and why is it so difficult to do?

Speaking straight is being direct, clear, and honest in our communication. However, it's important to recognize that speaking straight is not simply "dumping our bucket" on others or being brutally honest without regard to the way in which we deliver our message. Rather, speaking straight includes the concept of "forwarding" what we're up to. It's being direct, but in a way that enables the other person to truly "hear" us and improves the likelihood of positive movement toward our team objectives. The whole point of speaking straight is to forward the action. It therefore requires an extraordinary amount of thoughtfulness as well as a deep commitment to "being for each other."

Why is this so hard? Because speaking straight frequently requires us to have uncomfortable conversations that we'd rather avoid. Often these conversations may appear to include some conflict. We may be fearful of hurting another's feelings or of risking our relationship. Paradoxically, we actually honor the relationship greater by being straight than we do by avoiding difficult conversations.

When approaching a difficult conversation, a helpful technique is to acknowledge to the other person your discomfort or awkwardness. By acknowledging this upfront, you can free yourself to have the conversation with less fear about the words not coming out precisely how you wanted. The listener is more likely to be able to "listen generously" and to work with you to be sure that you understand each other clearly.

When we're in the habit of being straight with each other, team effectiveness skyrockets.

Fundamental #20: **Be for each other.** Support each other's success. Operate from the point of view that we're all in this together and that any one of us cannot win at the expense of someone else or the enterprise. Look for each other's greatness and provide rigorous support when needed.

Like so many of the Fundamentals, this is about perspective as much as anything. It's about starting from the standpoint that "I'm for your success," rather than starting from "I'm waiting for you to fail." When we're truly "for each other," we do everything we can to help each other to succeed.

Sometimes being for each other requires us to do difficult things. As I described last week in Fundamental #19, speaking straight with someone can at times be awkward or uncomfortable; yet if we're really for them, being straight with them is a greater demonstration of support than avoidance.

It is impossible for a team to be highly functioning without teammates who are for each other. . . and it's impossible for an organization to succeed without extraordinary teamwork.

Fundamental #21: **Honor commitments.** Do what you say you're going to do when you say you're going to do it. If a commitment cannot be fulfilled, notify others early and agree upon a new commitment to be honored.

If we're to work successfully with other people, I don't think there's a more important Fundamental than this one. You need to be able to rely upon me and I need to be able to rely upon you – every time, without fail. Think about the kind of organizational and interpersonal power that comes from the ability to count on each other without a second thought.

As I discussed in Fundamental #17 (Be punctual), there's a significant difference between USUALLY honoring commitments and ALWAYS honoring commitments. If I usually honor my commitments, and I promise something to you by Tuesday, you don't know for sure whether you can count on it being done. Is this one of the 80% of commitments that I meet, or is this one of the 20% that I fall short? Only if I ALWAYS keep my commitments can you truly rely upon me.

In a world of interdependency, I often hear people struggle with commitments because someone else didn't do their part. For example, we may have committed to get an answer to a client by the end of the week, but the carrier hasn't gotten back to us yet. A key component of "honoring" our commitments is the ongoing dialogue we have with those to whom we've committed something. We need to do everything possible to ensure that the commitment is met. However, if circumstances will prevent the timely fulfillment, we have a responsibility to let the other person know at the earliest possible moment, and then to mutually create an alternative. Perhaps a portion of the commitment can be kept, or perhaps a new date can be agreed upon. The key is early communication.

Interestingly, I find that the biggest obstacle to honoring commitments is not the will to get them done, but rather a sloppiness about the promises or commitments in which we engage. Too often, we promise things that simply cannot be done, given other commitments that we also have. It often feels easier to say "yes" to another's request, rather than being more rigorous about assessing our ability to fulfill it. The first step to honoring ALL commitments is to increase our discipline about making sure our commitments are realistic to begin with.

Our own personal, and by extension, organizational credibility is based on the ability for people to rely upon us to do what we say we're going to do when we say we're going to do it . . . ALWAYS.

Fundamental #22: **Be a source for acknowledgement and appreciation.** Positive feedback is a tremendous energy source. Regularly give, receive, and ask for meaningful appreciation and acknowledgement.

There are few things we can do that are as simple, yet powerful, as providing meaningful acknowledgement and appreciation. When we're acknowledged for work well done, we feel happier, more energized, more positive, and we're more likely to repeat the behavior that generated the acknowledgement. Here are some things I'd like you to consider regarding appreciation:

1. Acknowledgement should be meaningful. Simply saying that everything is "wonderful" when it truly isn't, not only fails to have a positive impact, but the opposite is actually true. It tends to undermine the credibility and power of "real" appreciation.

2. For acknowledgement to have maximum impact, identify the specific behavior that you appreciate and tell the recipient how it impacts you. For example, “I really appreciate the way you explained that program. By using simple words and building the concepts sequentially, you made it far easier for me to understand.”
3. There’s no room for “victimhood” when it comes to appreciation. Learn to ask for the kind and amount of appreciation you need. People cannot read your mind. While this can feel awkward because it’s unusual, our practice of the Collaborative Way gives us the tools and the environment for “speaking straight” with regard to our needs.
4. In an effective workplace, acknowledgement and appreciation must flow in all directions: peer-to-peer, supervisor-to-team member, team member-to-supervisor.

At RSI, we have a community of people who are unusually good about acknowledgement and appreciation. Keep this up and notice the power it has to help each of us to be our best.

Fundamental #23: **Take responsibility.** Don’t be a “victim.” Ask for what you need and take full responsibility for your success.

This is the first of the group of Fundamentals that addresses personal effectiveness, and its position as the first is not by accident. I don’t think there’s a more foundational principle about effectiveness than this one. All success begins with our acceptance of our own responsibility, for without this, we’re left simply waiting for circumstances to serendipitously work out to our advantage.

Taking responsibility does not mean that we can do things alone. Rather, we live in an interdependent world in which we must work cooperatively with others. Instead, taking responsibility means taking “ownership” for circumstances. It means asking for what we need, rather than waiting to be given what we need. It means creating the environment we want, rather than depending on others to create it for us or bemoaning the fact that it isn’t what we want. It means researching a topic or taking a class rather than waiting to be taught. It means describing how we want to be treated rather than complaining that we’re not respected.

Taking responsibility is all about recognizing and acting upon our own personal power to create what we want in our lives rather than being a “victim” of circumstance. An organization of people who take full responsibility for their success is an organization that performs in extraordinary ways.

Fundamental #24: **Appearance counts.** Your personal appearance makes a strong statement about the pride you take in your performance. Dress neatly and professionally. The appearance of our office makes a similar statement about the quality of our work. Take responsibility to see that our office environment is clean, neat, and professional.

Think about your impression when you see a businessman whose tie is askew, whose suit doesn't quite fit, whose shirt is wrinkled, and whose shoes are scuffed and dirty. Now think about your impression when you see someone with a perfectly tailored and pressed suit, with a crisply pressed shirt, with shoes shined to a high gloss. (I apologize for the male only example – the same is of course true for a woman) Which person would you rather trust to be your advisor? While there are obviously far more important qualities to being a great advisor than your dress, your appearance *does* send a strong message about your approach. When you pay attention to the details of your appearance, you tell the world that you're likely to pay attention to the details of your work. It's tremendously difficult to be sloppy in some areas of our lives – particularly the most visible ones – and then miraculously become meticulous and detailed in other areas.

This same principle applies to your workspace and to our overall office environment. When a visiting prospect or client walks past your desk and sees piles of papers and files strewn over your entire work area with seemingly no order, how do you think this affects their confidence that you will effectively juggle and manage all the important details of their work? Conversely, when they see a neat, clean, well organized work area, it increases their confidence in your ability individually and in our ability as an organization. If we're meticulous about the details of our environment, we're more likely to be meticulous about the details of our work.

It's been said that you only get one chance to make a good first impression. Let's make sure that our first one is the one we want to project and that we continually reaffirm that impression by paying attention to our appearance.

Fundamental #25: **Being organized makes a difference.** Maintain a clean and orderly work area. Use an effective task management system to keep track of outstanding issues and responsibilities. Maintain an orderly filing system.

In a work world of interdependence, we're constantly making promises to others and having others make promises to us. We're juggling multiple tasks and managing a variety of issues at the same time. What could be more important to our success than having good systems for keeping track of everything that's "on our plate?"

Managing our work begins with managing our work area. As most people know, I have long been a proponent of keeping a clean and orderly desk. An orderly work area allows us to maintain greater focus amidst what can sometimes feel like chaos. It helps us to work more effectively, enabling us to get more done in less time with less stress. While I've heard some claim to work well in chaos, claiming they "know where everything is," I would strongly contend that each of us could be more effective if our surroundings were more orderly.

Equally important is the system we use for managing our multitude of tasks. An effective task management system helps us to know what should be worked on and when various

issues are due for completion. It should also help us to identify priorities so that higher priority issues are handled before lower priority ones.

Being organized helps each of us to be more effective and also, appropriately, inspires others with a sense of confidence that we're "on top of our game." Time invested in personal organization is paid back many times over in increased effectiveness.

Fundamental #26: **Double-check all work.** Proofread all letters, e-mails, spreadsheets, etc. for accuracy and correctness. Accuracy is a reflection of A+ness.

Most often the difference between accurate work and making mistakes is as simple as proofreading. Slow down and take the extra time to proofread your work.

While e-mails can be quick and informal, there is absolutely no reason to have words misspelled or sentences that are missing words. Spell-check is an easy tool to catch many errors, yet it won't catch missing words or words that are used incorrectly. Before you hit the "send" button, take the extra time to read over what you've written to be certain it's of a quality that you can be proud.

Spreadsheets are an easy place for errors to happen. Because the formulae are hidden behind the cells, it's not always obvious when a mistake exists. Learn to spot check different cells to be sure that the answer matches what you would expect to see. Multiplying is a good way to check your division and addition is a good way to check your subtraction. The more complex the spreadsheet, the more likely it is that there will be an error. I almost always have mistakes in my spreadsheets on the first try. Double and triple checking helps me to catch these errors before my work is done.

When you produce a document, whether it's an e-mail, a letter, a proposal, a report, or any other work product, it represents you. Take pride in the quality of your work. Be certain that it's worthy of your signature. The path to high quality is simple – proofread, proofread, and proofread.

Fundamental #27: **Look ahead and anticipate.** Be better prepared by anticipating future needs and addressing them today. Avoid the mistakes that come with last-minute actions.

This is one of the most simple, yet powerful methods to reduce stress and increase effectiveness. As you plan your day, be sure to look at your schedule for next week and next month. What's coming up that needs preparation in advance? What answers might you need before you even begin working? Are there opportunities to be requesting those answers now so that you have them when you need them? What might go wrong at the last minute that you can anticipate now and possibly prevent?

Here's a simple example: You have a meeting with a client 10 days from now. In order to prepare your presentation, you'll need certain proposals and you'll need time to review those proposals for additional questions. By planning in advance, you can make sure that the proposals are in on time and that you have sufficient time to get answers to any relevant questions in the proposal prior to meeting with the client. In contrast, if you wait until the appointment is the next day, you may not have the correct or the complete information. You rush off to the client feeling stressed, racing around for the missing pieces, increasing the risk of errors that you didn't have time to check (see Fundamental #26: Double-check all work).

Develop the habit of looking ahead and planning your work accordingly.

Fundamental #28: **Have a bias for structure and rebar.** Look to create systems and processes that support our ability to perform with consistency.

“Rebar” refers to the steel rods often used in concrete construction as a reinforcement or support. In a similar way, we can create rebar to reinforce or support us in creating consistency in our performance.

When we try to implement a new behavior or process, we're fighting against the inertia or force of habit of how we always “used to do it.” It's amazingly difficult to erase old habits and replace them with new ones. The key is to develop structure and rebar.

Here's a simple example: Let's say two people each want to begin to keep a clean desk area (see Fundamental #25). Person A creates several systems for where to put the papers, folders, and other material that are usually left on her desk. She then arranges with her manager to do a weekly check-in on how her clean desk effort is going, and even sets a goal for the number of consecutive days with a clean desk and establishes a reward for herself for achieving her goal. She posts the number of “successful days in a row” in a prominent place outside her work area. Person B simply is determined to try his best to keep his desk clean. Which person is more likely to be successful in meeting their goal?

Structure and rebar can be as simple as a checklist or a chart, or as complex as a detailed reporting or measurement system. The important thing is to create a support mechanism that works for you.

Having a “bias” for structure and rebar means learning to put support in place for every new behavior. As soon as you identify a new goal, ask yourself what rebar you can create to assist you in developing a new habit to replace the old one. This is a critical element in creating long-lasting change.

Fundamental #29: **The quality of your answers is directly related to the quality of your questions.** Learn to ask yourself, “What information is missing, that if I knew this, the best course of action would become self-evident?”

Nothing is more important to sound decision-making than having a clear and complete picture or understanding of the facts. Given this, it's fascinating how often we try to make decisions based on particularly limited or incomplete information.

Like most things, this is not a "black and white" issue. Clearly there are times in which we cannot gather EVERY relevant fact or simply are faced with time constraints that don't allow the collection of all the facts. However, my experience is that a thorough analysis of all the important data that IS reasonably accessible makes any decision better.

So why don't we typically put enough effort into collecting our facts? I believe the primary reason is a failure to actually stop and identify what the missing pieces of the puzzle are. If we develop the habit of asking ourselves the question posed above - "What information is missing, that if I knew this, the best course of action would become self-evident" – our decisions would be much easier to make and more likely to create the results we desire.

It's truly a simple formula. 1) Identify what you need to know (but don't already) that would make the best course of action obvious. 2) Gather that information. 3) With a clear and reasonably complete picture, make your best decision.

Fundamental #30: **Be quick to ask and slow to judge.** Learn to gather the facts before making judgments. Be curious about additional information that may yield a more complete picture.

How many times have we seen a situation where we had bits of information, filled out the rest of the picture in our mind, and then came to a conclusion that ultimately proved to be incorrect? I find this to be particularly common when it comes to making interpretations about other people and their motivations. Let's examine this more closely with a simple, even mundane example.

We know that it's the responsibility of each person to clean their own dishes as well as those used with a visiting client. One day, you walk past the kitchen and see a manager place several dishes in the sink and then leave. Angry at the blatant disregard of our common understanding and courtesy, you grumble to a co-worker about how the rules don't seem to apply to managers. Further, you carry this view of the world with you into other interactions and interpret what you see from this perspective.

But might there be more to the picture? Try this, for example. When you explored further, you learned that a co-worker had been in a client meeting and was carrying a load of dishes back to the kitchen and was also trying to juggle several proposal binders. Seeing this, the manager quickly offered to carry the dishes back to the kitchen. At the moment you witnessed the event in the kitchen, the co-worker was still engaged in a conversation with the client and had not yet gotten back to the kitchen to take care of the dirty dishes. Had you known the rest of the story, you would have been pleased that you

work in a place where people are quick to assist each other and you would carry this different view with you into other interactions.

One of the keys here is understanding the difference between a “fact” and an “interpretation.” It’s a *fact* that the manager left the dishes in the sink. “The manager doesn’t care about the rules” is just one *interpretation* from that fact; but as we’ve seen, there are many other available interpretations from that fact.

As we learn to suspend our judgment and become more “curious,” we gain more choice and flexibility. We have more options for how to respond. Learn to resist the temptation to “jump to conclusions” before you have more information. Be curious to learn as much as you can to gain a greater understanding of the entire situation. As we gather additional information, remember Fundamental #18 – Listen Generously. Make your starting point the most generous view you can have.

There is great power in gaining a deeper appreciation and understanding of each other. Deeper understanding begins with genuine curiosity. Genuine curiosity begins when we are quick to ask and slow to judge.

A handwritten signature in black ink that reads "David". The letters are cursive and fluid, with a large initial 'D'.