

Gil Moegerle: Welcome to Navigating the Business Storms of Crisis and some of the best practices, insights, and advice heard from the members of the business community about managing crises. In this case the 2020 Coronavirus pandemic. I'm Gil Moegerle and with me is Chief Executive Officer Mitch Santala. Mitch...

Mitch Santala: Well I'm excited today to have Brad with us. He's been one of our longest clients here at Executive Scheduling Associates. In fact, he's been with us prior to us being officially organized as a business. So he goes way back.

Gil: Interesting.

Mitch: A long, loyal client of ours, we see him more like family than we actually do a business partner. But we've got Brad today and excited for some of the things he's going to share with us.

Gil: All right. Here's the first of three clips from a conversation several days ago with Brad. By the way, we are going to work our way from the lighter side of responding to a crisis to the more serious stuff.

Our company's Director of Communication, Erin Pruetz, was involved in this conversation and she asked the first question.

Erin Pruetz: Have you run into any stories, either in business or your family or your neighbors, that are particularly funny or heartwarming during this time?

Brad: Okay, so I'll tell you two stories. So story one...my children, it's kind of funny... my daughter, my 16-year-old daughter, is taking this the best in my household by far. It's like she doesn't want to do anything, she doesn't want to see anybody. We had a teenage son of a good friend of ours that's like a sibling to them come over and he was talking to me about cycling and she came out into the garage and waved to him. She didn't want to get anywhere near him. It's really quite funny how she doesn't want to.

And then my 19-year-old freshman in college...he's mad at the world. Three-and-a-half billion people are on quarantine but somehow his experience is the worst on the planet. We've always teased him his whole life -- if he burns his hand on a hot stove it's the worst burn in the history of the human race. He's superlative in everything that he does.

That's one thing I've been trying to do on social media. I always to be funny and be amusing because social media can be so divisive and everything's political. And so when I started, a couple of weeks ago, to be light and funny on Facebook, I started posting "Updates from the Quarantine Kitchen," which is my kitchen where we've been cooking. We've pretty much developed a policy where, to support local businesses, we are only taking take-out once a week -- maybe twice a week -- but generally speaking, we are cooking at home every night.

And we have been on, I think, a 31-day-streak of not repeating a meal and it looks like we're going to keep going.

Gil: Amazing!

Erin: That's impressive.

Brad: I post the photos of what we cook and I get funny comments like, "Hey Brad, is there a vegetable in any of these photos?" or "Hey Brad, I gained five pounds reading this," "Hey Brad, are you going to make a pop-can of biscuits after this is all said and done?" to "Oh my God, that looks amazing. Send me the recipe."

I posted a how-to video on how to make stir fry, chicken fried rice, and I did the photo tutorial on how to make the perfect grilled cheese.

Erin: That's fantastic!

Brad: I'm just bored! So yeah, good fun.

Gil: Fascinating.

Erin: That's great.

Mitch, I love the sense of family that comes through that.

Mitch: Yeah, you know times are changing when you're trying to make the perfect grilled cheese.

Gil: *Laughing* That's right. He's bored!

Mitch: We have one of our Account Managers, Libbie Decker, who oversees a team of probably about 15 or 20 schedulers, and during this time, she had the idea to socialize around a recipe book. So as everyone's home and cooking more during these days, they're throwing out their best recipes and she's putting it together and then going to distribute a copy to everyone on her team. So again, a way of seeing that during some of these challenging times, we can make the most with our family.

Gil: It speaks, I think, of leadership in both cases. Family leadership and business leadership. The capacity to keep perspective and keep a lighter touch even though we are going through a crisis.

Mitch: Yeah.

Gil: Here's a second clip. I think we started with the question, "What's changed, Brad, about your approach to business. And, also, what has not changed?"

Brad: What's different is that I don't leave my house anymore other than going to the store or going to get supplies or the rare takeout that we do. That's significantly different. I've been on the road for 21 years, roughly, dating back to the late 90s and so every week I was going somewhere. Whether it was early in my career when I was getting on a plane and heading to one of my 16 states that I had up in the Northeast or my role now, when I get in the car and I may drive half-a-mile from my house to my first meeting on Monday to I may drive four-and-a-half hours down to Miami. That is significantly different because this is an energy job where you where you're out and about, you're mixing it up, you're getting in and out of the car, all day long, every day to sitting at a desk all day now. So that's significantly how it's different.

How it's the same? I mean, still, obviously, you need to perform, there's pressure. Sales have been good as an organization, which is kind of a little bizarre to me that sales have been good. Unfortunately, on the other side, we are in the business of bringing money in, but also money leaves. We've had a lot of money leave so that obviously becomes very important to senior management and so those pressures are there, the pressures of just performing in this weird environment we're in.

Gil: Generally speaking, big picture, what has the last six weeks felt like for you?

Brad: I would say, Gil, that's a great question. I would say it's, for me, being on the road for 20-plus years, it's actually been refreshing to not have to be out and about every day.

Gil: Interesting.

Brad: It's been nice to not have to travel. It's been encouraging that when I do my phone meetings or I do my WebExes or my Skype calls and I mirror my screen with people or I do a presentation, I've found that you can do my role...you can do a lot of it virtually. So that's been encouraging. I would say being off the road has been a nice break. I would say 99% of the time I'm really positive and I like it and then about 1% of the time I get pissed. I'll rant about something. And I'll blow my wife's hair back for a minute, getting mad about something I shouldn't get mad about. But ultimately, it's not uphill for me, it hasn't been.

Erin: I was going to ask if you thought it was going to be hard to go back to that schedule when it comes.

Brad: That's also a good question. I would tell you...if you all came on the road with me for a week, by the end of the week, your tongues would be dragging. It's a fact. It is a high-energy job. You're going...it is literally like you're going on stage five, six times a day to jump in. You've got to have high energy, you've got to be positive, you've got to care about what the other person has to say, and then try to fit in your agenda with what they're wanting to accomplish, and try to influence behavior. It's a very big energy exchange. I think, just like running or cycling or swimming or doing any type of endurance sport you've kind of got to build up to that point to get into shape. I think that'll be challenging, but I don't

think it will be challenging instead of being in my office five days a week, going out maybe two or three days a week. I don't think that will be difficult other than maybe getting a little winded and tired.

Gil: Tell me this: do you picture yourself taking into the new normal any of the things that you've learned or changed during these six weeks?

Brad: Yes, absolutely. I would love to see a scenario where...I typically now leave on Monday morning and, depending on where I am going, I come back Thursday night and I'm local. It's like four days a week, you're out seeing people and then Friday you're doing your expense report, your activity logs, your conference calls. I maybe see that going from four maybe down to three or two because what I've found, Gil, is that since I've been in this particular job, this particular territory, this particular company, and my main two firms for 15 years, I know all these people really well and they're friends. So I don't think a lot of them I'm going to need to see face-to-face as often as I have in the past. And I don't think they're necessarily going to want to see me as often as they have in the past. I think advisors are going to change the way they do business. But I think with the people I know I think I can do a lot more virtual meetings. I think the challenge is going to be the prospecting side -- the people that don't know me or don't know people that do what I do. They're going to be more averse to seeing us and I think that's going to be the challenge.

My world is always...there's two types of people: people you've pissed off and people you're going to piss off. As far as we're in the product of selling feelings, Gil. I always say, "I sell investments. You can't touch it, you can't feel it. If it does well, you feel good, if it doesn't do well, you feel bad." Sometimes I sell something that works and they're happy and sometimes I don't. Depending on how good of a relationship I have and how many times they've been burned, it's not that I intend to do that, it's just the nature of the beast. So you have to prospect because the business evolves so quickly -- advisors retire, advisors die, advisors sell their books, advisors change their business model, products come in and out of vogue -- so you're constantly having to evolve that and find new people.

Gil: Mitch, I'm thinking there are two or three things there that we can sink our teeth into.

Mitch: Yeah, I mean, there are a few things we can pull out. But I think the most obvious thing that stands out to me is that crisis creates clarity. The fact is, he says this, as you listen to his interview, "I've been on the road for 21 years." A fast-paced routine, a schedule. This guy gets up early in the morning, he's tackling his week, he's got a lot to do in four or five days while he's out on the road and now he says, "I'm not leaving the house that much." And I think what's getting to me in what he's sharing is the contrast. It's the disruption. All of a sudden, there's a hard stop. And because of that hard stop, that contrast, I think clarity comes. And that's why I would say crisis creates clarity. It's abrupt.

It's kind of like that scene on *Tommy Boy*, you know, where they're sitting on the side of the road and Richard smacks him across the face with a two-by-four. "Not right here...but riiiiiggghht about here," is what he's saying and so I think crisis is kind of that type of jolting

contrast. And because of that jolt, it can kind of wake us up in that moment to actually get some clarity in our life. And it can be actually a gift to us where I become hyper-aware of what's going on around me. And it can be helpful to me.

Gil: You know, as I hear you use that analogy, I'm thinking of our last episode where our guest, Brett, said that this current crisis forced his family, like all of us, to slow down. Which includes a daughter who is just weeks away from leaving for college. And I'm sure he would say to you the crisis had added to his clarity how much that girl means to him and how much his family means to him.

Mitch. Absolutely. And I think the reality is we get clearer in those moments. And this is what I love about Brad. He's making the most of this hard stop in his life. The interruption. And he uses the word refreshing.

Gil: A surprising word.

Mitch: Yeah, it just rolls right off of his tongue. And I can think of a lot of words that people are using to describe their hard stops in life. I know in my own life, I've had plenty of those. And refreshing isn't necessarily at the top of my list. And knowing enough about Brad's success, knowing enough about who he is, I think he's found a way to hack the system and I want him to teach me his Jedi ways.

Gil: Me too!

Mitch: In fact, we heard him say there's a good chance that he's not going back to the way things were. But probably a bit of a new normal. You know, similar to Brett in episode one, where he talks about the 15-minute rule, Brad will most likely travel one day less per week. So like Brett, some change can be good. And crisis can give us the clarity to embrace that.

Gil: Mitch, you were talking to me before we sat down to record that there's an aspect of this issue that's quite personal to you.

Mitch: The thing that bothers me most in this episode, when I'm talking about it, because I'm speaking to myself in the mirror here, is that too often clarity has come at a high cost in my life. It's come through crisis. It's come through pain. And it didn't necessarily have to.

Now I'm not saying you can avoid every storm, I'm not saying you can avoid every crisis. But at the end of the day, we can do work that prepares us to walk through crisis better because we have clarity.

A couple of years ago, being a business owner, I'm a family man with four children who are growing up, starting to launch out beyond the house into university and married life. I'm an active member at my church where we volunteer and serve. There came a point where I was so busy and was so running at a ridiculous pace where the word that best described the situation I found myself in was burnout. It was the opposite of refreshing.

I had filled my life so full running at a ridiculous pace that I was running on fumes and I didn't even know it. And I remember one day, it all kind of came to a head when I woke up and I realized I didn't want to be around people.

Gil: That's hard for a business leader and a volunteer pastor.

Mitch: I tend to be more extroverted than introverted and so there was this weird thing going on and I think the reason why I didn't want to be around people is because I knew the people who knew me would know something was going on. Something was wrong with me.

Gil: Yeah, they'd spot it.

Mitch: And I didn't know what was wrong with me, so the last thing I want to do is sit front row to a million questions of "What's wrong with you?"

So I decided to avoid being around people that day and I just took a drive and I ended up finding a place in our city, just walking up and down the street, thinking, praying, reflecting, just trying to go, "What's going on here?"

And I remember in the middle of that walking up and down the street, a homeless person saw me from across the street, walked across the street and, of course, asked me if I had any spare change.

Gil: Sure

Mitch: So what did I do? I did what probably most of us would do; I put my hands in my pockets, acting like I was reaching for something, pulled them out to show them I didn't have any change in my pockets, and said, "Sorry." And, of course, this person said, "Thank you." They went on their way, I turned and went on my way and I didn't even get two or three steps and what I realized is that was the problem with my life. I didn't have any spare change. I have filled my life so full with good things, so ridiculously fast-paced that I didn't have any margin, I didn't have any space in my life to create refreshing and I was losing my clarity.

And the nice thing about that crisis is it taught me a new way of how to bring refreshing into my life so I can actually walk in a rhythm of clarity rather than waiting for crisis to just show up at a certain date in the future that I have no idea when it's going to happen.

Thinking about ways that we can bring refreshing into our lives I think of Rick Warren, best selling author of *The Purpose-Driven Life*. He uses three key ways of how to bring refreshing into your life. He talks about diverting daily, withdrawing weekly, and abandon annually.

Now diverting daily, that's just finding something to do that breaks the work cycle in your life. Maybe in the morning, you're getting up and you're going for a 20-minute run. Maybe at the end of the day from work for you, you come home and the first thing you do is just sit on the couch with your children or your spouse and you don't talk about work, but you just connect relationally. But whatever it is that brings you a sense of energy on a daily basis so you can get clear on what's most important.

Gil: You're reminding me, Mitch, of one of my favorite things and that is I am experimenting with a 20-year dream of becoming a vineyard manager. So I've got this baby vineyard started...there's nothing that does it for me like getting up from my desk, walking through the vineyard and back to my desk. I may have spent five minutes doing that and I'm refreshed.

Mitch: Absolutely. It does. So diverting daily just gives us a sense of orienting our life, getting some clarity before everyone else has their plan or their agenda for your day.

The second thing is withdraw weekly. Now we know doctors know this is good for us. Therapists, they're going to tell you that's good for us. Even God knows this is good for us.

Gil: Day of rest.

Mitch: We're all created and designed to have a full day a week to actually be disconnected where we take a moment intentionally to connect with ourselves, the people we love, friends and family, so that we get re-energized and recharged about the things that matter most. So we're not working *for* rest, we're actually working *from* rest and into our week fully charged, rather than depleted.

The final thing is just abandon annually. And this is probably the hardest one for me because I tend to be a workaholic, I find a lot of joy in working...it's something wrong with me, I know. And it takes a little bit of planning. Getting this on the calendar is really the work for me. But finding a period of time, a week where you can get away on a vacation, a retreat, and you actually disconnect long enough from your work so that it untangles a bit.

For me, so much of my identity is wrapped in what I do and I don't know if I'll really be able to separate that. But for sure breaking away from my work long enough on a vacation really helps refresh me and bring that kind of clarity.

Gil: All right, let's move onto our final question for Brad. We brought up the subject of teamwork in a crisis. The critical aspect of us leaning on each other to get through a difficult period and asked how we could best support him.

Brad: Oh, you're already doing it! Alyssa has been my scheduler a long time and it is very nice of you to do what you all did; it certainly isn't expected.

Just making those calls. I've got to tell you: I hate scheduling. It is a task I loathe. It is like that commercial...Gil, you'll remember this and Keri. I don't know how old you are, but you

remember the "making the doughnuts" commercial from the Dunkin' Donuts back in the 70s and 80s.

Gil: Yes.

Brad: Time to make the doughnuts! I made the doughnuts. Time to make the doughnuts! Scheduling is making the doughnuts and I hate making the doughnuts. I appreciate the fact that you all have been with me for a long time and kept my calendar full and are keeping it full. Just going to modify what we do: if it needs to be a phone call versus a face-to-face, that's great. I appreciate being part of the family.

1980 Dunkin' Donuts ad play

Baker: Time to make the doughnuts!

Announcer: Dunkin' Donuts are always fresh.

Baker: I made the doughnuts.

Announcer: We make them at least twice every day.

Baker: Time to make the doughnuts.

Gil: I wish we were on a video. I wish we could show that frazzled baker with flour all over him, "It's time to make more doughnuts."

Mitch: You know, what Brad's getting at really, though, is no task is too small when it's important work. Not all important work is fun, not all important work we want to do, but we need to do it and there are just some tasks that we don't enjoy doing.

And fun is really a subjective word. But at the end of the day, not every task that is important is fun for us. You know, for Brad, he's saying getting on the road four or five days a week, running fast, high energy, presenting, meeting people, doing anything he can to add value, to him that's the best day ever. He loves it, obviously, he's been doing that for 21 years.

But what we also hear from Brad is doing a lookup in a database where he's having to filter down what part of his territory he's going to be in so he can build a dial session to actually schedule those meetings for the next week out...

Gil: That's making the doughnuts.

Mitch: He uses the word loathing. I don't even know when I've heard the word loathing. But he hates to do that work. But he's not ignoring it. What Brad has decided to do is he's decided to partner with...he's brought people into his team to really rally around the

important tasks and even if it's not something he wants to do, he has people on his team doing that work who may be able to do it even better than him. And as a result of that partnership, he's able to cross the finish line, hitting success, knowing that there's no task not getting done that's important to him.

Gil: You've been listening to the second in a series of podcasts we're calling Navigating the Business Storms of Crisis. Next time you'll hear from a financial wholesaler who's built a successful practice around plans, processes, and performance. Join us again.