

Gil Moegerle: Welcome to Navigating the Business Storms of Crisis, Part 3: The Power of Presence.

If you're new to our podcast, Executive Scheduling Associates, or ESA as we call the company, manages appointment scheduling for roughly 500 North American financial professionals. In the process, we have approximately a million exchanges per year with members of that industry. We hear a lot of business best practices and we wanted to share some of those insights with you. In this case, how the business community is responding to the 2020 Coronavirus pandemic.

I'm Gil Moegerle. And with me is Chief Executive Officer, Mitch Santala. Mitch let's start with an introduction of our guest for this episode, Kevin.

Mitch Santala: Yeah, well, first of all, Kevin has been with us for the past nine years so he's not new to the family. I think what I really like about today's interview is just the high energy. He kind of lives his life out loud, on his sleeve, really makes the most of life. And I think today what you're going to feel and what you're going to get is that kind of energy from him.

Gil: Let's start with the first of three clips we're going to use that's on the light side. It's just fun. I think it's a minute-and-a-half or something like that. Maybe in the middle of a crisis, this is a good way to start.

Mitch: Yeah.

Gil: By the way, the first voice you'll hear is our Chief Operating Officer, Keri Gentry. She was on the call to our client.

Keri Gentry: Kevin has been doing these amazing photos of different famous people where he's dressing up as them. And it is comical!

Kevin: Yes, I've done Pitbull, Mike Tyson - I had a tattoo on my face, Anchorman, Santa Claus, Mr. Clean, Run-DMC, Eminem. Joe Exotic was pretty good...Kevin Exotic, the Puppy King. I had my dogs go to work with me and one had a toupee, one was with a bow tie.

The story starts out I'm helping an advisor out and I see these bananas and I go, "Those are perfect bananas. I'm going to put these on my head." I looked at myself in the mirror and I'm like, "You're not going to believe what I am doing. Actually, I have bananas on my head." She starts laughing. "I guess I'm going bananas staying at home. You've got to see this."

So I sent her a picture and she starts laughing, so I put it on Facebook.

And so it would be funny to get on my company WebEx, 150 people. We need to be lighthearted...everything's so serious. Everybody's laughing, right? So I was like, "Today I'm channeling old-school Run-DMC working from home," and this is how this thing starts. Now

there's this pressure. I get requests. "You should do this!" I'm like, I only have so many things in my closet.

Gil: Mitch, I always find a professional with that kind of approach and attitude fascinating. You know he's under pressure. You know he's got deadlines and goals to reach and yet he's got time to laugh, not only himself, but he's got time to help other people laugh.

Mitch: Exactly. He's making the most of the situation. We saw that with Brad with Quarantine Kitchen. We see that with Brett trying to make the most of his situation with his family. And again, here's just another take of a guy who's saying, "I'm going to make the most of what I've got in front of me," and, as a result, he's gotten quite a bit of action with his friends and people on social media.

Gil: In fact, he's come up with sort of a new marketing idea, I think I heard him say.

Mitch: A new pressure! He has to deliver now. He's running out of clothes going, "Hey...how do I one-up myself from yesterday?"

Gil: Exactly! That's what I'd be thinking. There's nothing left in the closet.

Mitch: That's right.

Gil: Well that was a fun start. Let's turn now to the more serious points we heard him make that I know you want to comment on.

The next question that we asked came from our Director of Communication, Erin Pruetz.

Erin Pruetz: Kevin, tell us a little bit about what's different about your work during this crisis. And equally as importantly, what is the same about your work?

Kevin: Let me start with this. First of all, it's a huge honor to even be invited to this, so thank you so much. I hope everybody on this, who's going to listen to this, your family, and you are doing well, you're healthy. I want to also mention that I truly have the best of the best scheduler, I think. Sherrie is amazing, I consider her like family. She's a huge part of my success, so that's important to me.

On that note, for those who don't know me or know anything about Kevin Foreman, I always look at life as the glass is half full. Probably completely full in my world. I live life to the fullest. I appreciate all I have in my life.

In regards to the pandemic we're facing today, there's a lot of craziness going on in the world and we take a step back and evaluate ourselves -- if you have your health, your family, and love, you've got all the things in the world that we all need.

With any crisis, I always think, "Winners will find a way to win." My fundamentals of who I am, my business never changes. I always believe in you have a plan, you have a process, and then every day you go perform it. I live my life by those three Ps.

When we go through situations like this we can all get better at our craft. We have to refine it, we've got to be creative in all different angles. I'm constantly trying to think outside the box and I always say to my colleagues and people I help mentor, "At times like this, you've got to be everywhere." Make yourself a presence, see what you can do to help people out.

Gil: How are you and how are your family, on a personal level?

Kevin: First of all, thank you for asking. We are great. My mom is 75-years-old; the lady looks like she's 57-years-old. She's amazing. I'm more concerned about her. Monica and I, we're very limited in who we see because it's so important to me that my mom can come over and have dinner with us. My mom's my world, my family's my world, my friends are my world. So I'm blessed that everyone I know is healthy.

My heart goes out to people who are not working -- the restaurant business, the travel business. I'm great. I'm blessed and fortunate and I wake up every morning and I'm passionate about what I do. I help people out. That's how I look at my life.

Gil: I know, Mitch, from the look on your face, there are a lot of things there that caught your attention.

Mitch: Yeah. Oh man, where do you go with this one, right? He put a lot of one-liners out there. He says, "I'm a glass is half-full kind of guy." So we could probably spend a moment here talking about the power of positivity. Or when he says that at times like this, you've got to be everywhere. Make yourself a presence, see what you can do to help people out.

And I'm feeling that's where we might want to camp out a bit here today. Just talking about the power of presence.

Presence is like the forgotten or neglected way of leadership. It's one of those things that we know is important but it kind of can take a back seat to the rush and the fast-paced life of leading and going after success and just trying to navigate a world that's really about progress.

We live in a culture that says, "More and more. Faster and faster." The digital age we're in, it's about fast money, it's about fast deals, fast media, fast food. Everything's coming fast and we have to learn how to pivot and react and lead and be successful in a really fast-paced industry, a fast-paced world.

And as a result of that, we can learn to be successful kind of from a distance. The digital age allows us to lead, allows us to connect from a place where we're not actually physically present. And we can be successful for it. And there's nothing really wrong with that. But presence isn't fast, it's slow. You can't really be in a hurry and be present.

Gil: I have to interrupt, Mitch, because you're reminding me of a social media post I saw just yesterday. It had something to do with a guy whose Pops, his dad, asked him to take him to the bank to transfer some funds. And so they're coming out of the bank and the young man says, "Pops, why did we come all the way down here? Did you know you can do this on your computer?" And his dad says, "Yeah, but in the time I was in the bank, I got to see two friends I haven't seen for a while. And by the way, son, when your mom passed, my banker came to the memorial service."

That's the point you're making. It's slower, but it is more powerful.

Mitch: Yeah, so presence is just one of those things that I think has a lot of power, especially when you're working through a crisis. But it's a different kind of investment that we make that requires time, it requires patience, it requires showing up. We can lead and work from our positions and our pedigrees all day long and they do work. Experience and credentials actually matter, especially if you're working in the highly regulated financial industry. You've got to have those credentials. You've got to have that experience.

But we have to accept that when we lean on our experience, or our credentials, to influence others, we are actually leveraging what I call our success equity rather than our relational equity to influence others. It's an external mechanism that we use to persuade people rather than the internal mechanism to really lead people to listen and follow us and for change. And I would argue that, during a crisis, we really need to lead from the inside out rather than from the outside in.

When it comes to loving and leading the people that we serve, whether it's our clients or employees, or families. Maybe it's our communities. Presence matters most. It's that old adage: people don't care how much you know until you know how much they care.

Presence isn't, "Look what I've done!" It's "What can I do for you?" Presence isn't driven from my hard work or my success or any accolade I might have achieved in my life. It's driven from my heart to serve others. Presence is less of a statement and it's more of a question. It's jumping in and really trying to understand the context so that I can pull everyone into solving the problem, while we're in this crisis and trying to lead through it. It's kind of like two sides to the same coin. On one side, you have identification. How do I identify with my people or with the people that I serve or my employees or my family...how do I identify with them so they actually feel like I'm connecting with them. I understand them. There's context. And the other side of that coin would be the word empathy. It's this deeper word -- not sympathy -- it's empathy. And those words really are different.

Sympathy is me feeling the pain from my point of view. So I look at you and I feel sorry for you.

Gil: I can tell you're hurting.

Mitch: Yeah. And sometimes it's almost a bit aloof. It's that sense of, "I can tell you're hurting and I feel bad for you. But I don't feel bad."

Empathy actually pulls me into where I experience the pain that you're feeling. I feel your pain. I don't feel sorry for you, I feel sorry *with* you. And it really is a whole different understanding and a context. And I think what we mean by being present, especially in a crisis, when the people we lead and the people that we serve might be feeling a little anxious. They might be feeling a little uncertain right now with the market volatility or is my job secure or is my husband or my wife's job secure? How do we lead in this place? I don't know that you can fail when you choose to show up with skin on, identify with your team, identify with your people, and show a little bit of empathy.

Gil: People can tell the difference, can't they?

Mitch: Absolutely.

Gil: That sort of cold, aloof leadership as opposed to, "Yeah, I know what you're feeling."

Mitch: Right. You know it's where we move past our confirmation biases to see others for who they really are and how they really feel. To be empathetic, we need to love and lead the people for who they are, not for the version of ourselves we want to see in them. And that's actually a Thomas Merton quote.

I think what we have to understand is that presence is not proximity. We know the ancient poets, Guns N' Roses, in their song, "Every Rose Has Its Thorn"...

Gil: I haven't heard them called that. That's interesting.

Mitch: That's right. But they know that although we both lie close together, we feel miles apart inside. We know that just because we're in the same room or the same bed doesn't mean we're actually close and connecting. Just ask my wife, about that question. We've had those moments where she's talking to me about her day.

Gil: Oh, we've all had that!

Mitch: I've come home and I'm in the room but I'm not really in the room.

Gil: You are not here, husband!

Mitch: That's right. And I get in trouble in those moments. I have a really good friend of mine who we go back many, many years and when we were younger and we had our kids who were littles, running around the house, him being a successful business guy, I can relate to how busy he would have been, coming in, late and going to work early and I remember him telling this story to me one time.

At one point, at the peak of that season, he had come home after a long day's work. And his son came to him, who was little at the time, and went down to his shoes and began to untie his shoes. And he was a bit taken back by that and looked down and said, "Well hey...what are you trying to take my shoes off for?" And he said, "Well, Daddy, are you going to take off your shoes?" He said, "Well, of course, I'm going to take off my shoes at some point, but why is that important to you?" And his son replied back and said, "Well, Dad, I know if you take off your shoes you're going to be standing home for a while."

And I just thought this little child didn't need a lecture but understood what it means to be present. "Dad, when your shoes are on, I know you might be preoccupied. I know one text message or one call, you may be running out to take care of business, but when you're shoes are off, you're settling in for the night, we're connecting, everything is going to be good because you're present."

Just because you're in the same room with someone doesn't mean you're present. We've got to show up in more way than that, with skin on.

Celeste Headlee, who's a TED Talk speaker, she's an author of the book *We Need to Talk*, she gives several key points. You can follow her, you can listen to her stuff...really good material on what it means to actually be present and some tools and tips on how to do that well. She gives a few pointers that I just wanted to highlight here.

The first one is just how we do this as leaders, is making sure we're not multitasking. I'm not the best at this. I try to think I can multitask and I can't and most people know they've lost me along the way. Brett talks about that in Episode 1, where part of the challenge he's facing in working from home is that when he's on a conference call and not on actually a screen call -- just a conference call -- he has these moments where he can hear keys typing in the background that makes him think he doesn't really have the attention of the person. They aren't really present. So anything we can do to not multitask.

The second thing would be just ask open-ended questions. The value of asking the question that's open-ended really lets people begin to crack open where they might actually be. Questions that begin with who, what, when, where, and why.

Gil: A closed-question is, "Did you have a good day?" because it can be answered with yes or no. An open question is, "Tell me about your day."

Mitch: Yes, exactly. And of course, my teenagers love closed questions. In fact, they even try to take my open questions and make them closed.

Gil: It's so true! Especially during adolescence. It seems like most kids pass through that silent period or the one-word answer period.

Mitch: "Yes, no, and fine." Those are the three words I think some of my boys have only in their vocabulary.

The next thing she says is just go with the flow. That's important as well because sometimes that open-ended question is going to lead you down a rabbit trail. But for that person, it's a real moment when they might want to share with you a success they've had or real challenge that they're facing. Or sometimes even a loss that they're working through. But the fact that you're willing to walk that road with them and then come back to the point of what the meeting might be about actually goes a really long way in establishing equity in that relationship.

Gil: A related principle, Mitch, is that the best next question often comes from the last answer. It's the same point that you're making: rather than go into a conversation where you want to be present with your agenda, listen to the answer, and see where that takes you.

Mitch: Yeah. Exactly. And you need to be secure in the fact that maybe the point of that meeting isn't what you thought it was going to be. But down the road, the value of that transaction will create business or some type of success in the future.

The next thing that Celeste says is, "Don't equate your experience with theirs." Especially if you're sharing in the same crisis. How easy it is for us to kind of hijack someone's bad day and we try to take over and say, "Well, I'm having a bad day too," rather than just accepting the fact that your crisis, even though we may be going through the same thing, is uniquely different to you. And how about we just resist the urge to actually jump in and allow their moment to be their moment. It's not always about me. And in this moment, being present, I get to demonstrate it's actually about you - the person I'm coming to see and value.

And then the last thing is just listen. Maybe a better word for this is active listening. This is where you follow up what you heard with a question to say, "Did I hear you correctly? This is what I think I heard you say. Can you clarify?" And it always gives room for the person who's speaking to actually adjust something or bring context or clarity so you're not leaving making assumptions and leaving with a misunderstanding.

Gil: I've heard you tell a chicken story that is perfect for the point you're making right here. Do you know what I'm talking about?

Mitch: Yeah, I do. So several years ago, Lanise and I decided to build a chicken coop. We were new at this, living in the city, not really having chickens before. And so we were just up for the challenge. So we raised these cute chicks in our garage, of course, until they were old enough, and ugly enough, really, to survive outside in the coop.

I mean it's fascinating to me that chickens can be so cute when they are young and then a full-grown chicken - gosh! - how ugly are they?

I couldn't wait for these chickens to start laying eggs. Add something to my life, give me an egg. We're feeding you, we're taking care of you - contribute to the household.

Gil: Of course!

Mitch: So after a few months we started going out with the expectation of finding eggs. I was kind of excited, maybe like a little kid on Easter, wanting to find my first egg here. Seeing what might be waiting for me. But the reality was that we didn't find any eggs. In fact, for many weeks...weeks and weeks...we didn't have any luck finding eggs.

And then the day came, of course, when we finally found an egg resting on our air conditioning unit at the side of our house at the chicken yard. One egg. But at the end of the day, we were excited to finally get our first egg. So we just celebrated, high fived, and went in and had ourself an omelet. The next day we went outside to check for more eggs and to our surprise, we found another egg and guess where it was?

Gil: Air conditioner.

Mitch: Yeah. Right there, on top. And so the next day, we went outside again to check for eggs and guess what we found? One egg resting on our air conditioning unit again.

So now we're a bit amused by this scene. We begin searching the coop for clues. Something was off and we were determined to solve the mystery. Eventually, my wife looked behind a pile of wood, and what do you know? she found a pile of eggs. About 30 or more eggs when we counted them all. Just sitting there, hidden, waiting to rot, and die.

And every day after, we would go outside to collect the eggs and guess where we'd find them? Three eggs behind a pile of wood and one right there on the air conditioning unit.

Crazy story.

Gil: Interesting.

Mitch: And so shortly after that, I was just sitting there kind of thinking about that again and a thought occurred to me about the random egg on the AC unit. We know this...this is the birds and the bees and the chickens. But when a rooster or a father is not present with the chicken, we know the potential for life isn't really happening there. Chickens might lay eggs in random places because there's no expectation for life to emerge. So I'm having this moment, this thought process... It takes a rooster and a chicken for life to actually happen.

So when a rooster is present, chickens actually will incubate and will nurture and presence themselves close to the eggs because they have an expectation for life.

And I just think there's a leadership principle in this somewhere. It's interesting, but as leaders or successful professionals or fathers and mothers of our families, we cannot underestimate the power of our presence. Especially in crisis.

Yes, we create. Yes, we communicate. But we have to lean in and provide the presence, create the environment, for life to emerge.

I think of the first three sentences in the Bible.

"In the beginning, God created the Heavens and the Earth. And the Earth was formless and void. And the Spirit of God was hovering over the surface of the waters. Then God said, 'Let there be light.'"

You know what's interesting is that word "hovering" comes from a rare Hebrew verb that is used to describe how a mother hen actually incubated its eggs.

Gil: No!

Mitch: So here we see God, the Great Entrepreneur. We would say He was pretty successful with creation. He created, He communicated, but yet in the middle of that, He presenced Himself like a chicken around an egg because He knew He needed to lean in and create the environment for life to emerge

And I just think that during a crisis, but even in general, in all of our leadership...Yes, as leaders we create. And we build visions. And we communicate. And we rally people and inspire. But if we could add our presence into that mix to create the environment so that which is possible, that which we see, can emerge. How much more successful we'd be in leading the people to create the things that don't exist yet.

Gil: Let's try to slip in this one more clip. It's a short one by Kevin, particularly because he got personal. Here's Kevin one more time.

Kevin: When I talk about winning, this time of year is kind of emotional for me. I lost my dad 21 years ago on April 19. I was 24-year-old. My dad pioneered the long-term care business. That's how I got into it. I wanted to be Backstreet Boy. And he said, "No, Kevin, you're going to do long-term care."

So I wake up every morning, passionate about what I do because I saw my father, who didn't buy a policy, never smoked, never drank, and was diagnosed with Barrett's esophagus disease. And by the time they caught it, he was in Stage IV. So when I'm talking to clients on a day-to-day basis, when I talk to my advisors, I speak from my heart and my soul. Because I saw how this affected my father, I watched my grandma go through dementia. My grandma is my world, as well. I used to sit at her house, folding letters, stuffing envelopes. My brother and I were probably child labor laws at \$.25 on the hour. But it was fun hanging out with our grandma.

But I'm passionate about what I do. Anything I'm going to do, I'm going to go all in. I always want to do best for the client, I want to do best for the advisors. That's my philosophy of life.

Gil: Mitch, a final thought?

Mitch: I love this clip so much because I feel like Kevin found something that so many people are looking for. It's just that deeper motivation, that deeper conviction, for getting up

in the morning and doing what you do. It's one thing to wake up and go work or do what we do for a paycheck. But when you can connect it to something deeper, a deeper meaning, it just brings that much more significance to our lives. When we lay our head on the pillow, we really feel like we're accomplishing something with significance rather than just making a paycheck.

Now again, nothing wrong with making a paycheck, we've got to pay the bills, we've got to put Cheerios on the table, we've got to do what it takes to take care of our families. But if we can do the work to get clear where we put our time into something that really satisfies a conviction, then all the better.

And so Andy Stanley, in his book *Visioneering* he kind of talks about the difference between a dream and a vision. And I think what Kevin's talking about here is he's found a vision that he's really giving his life to. He's connecting to his dad, the meaning of his work has personal significance and value and we can call it a vision.

And what Andy separates between the two. He says, "A dream is something that could be. Whereas vision is something that should be." The difference is a level of conviction. A dream all day long, it could happen, but if the going gets tough or if I get challenged in any type of way, especially in a crisis, I might bail on that because it's just a dream.

But when it's a vision...at the end of the day, I've got to do it. It doesn't matter what's coming at me, I'm going to dig down deep. I have to do this because it matters. And I think for Kevin he's talking about that's what he's found with his work.

Gil: You've been listening to the third in a series of podcasts we're calling *Navigating the Business Storms of Crisis*. Next time, more crisis best practices.

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