

Gil Moegerle: Welcome to *Navigating the Business Storms of Crisis*, Part 4. The current focus of many business people is leading through crisis. We wanted to take a look at some key principles of crisis leadership that are also evergreen. They apply in the calm and the storm. I'm Gil Moegerle and with me is Chief Executive Officer Mitch Santala. Mitch, let's start again with a guest introduction.

Mitch Santala: Well today I'm excited to have Karen as the person we are interviewing for a couple of reasons. She's been a client of ours for five years and in the industry for 15 years. If you followed her career success you would know that she actually has the credibility to be someone here, speaking to ideas on how to navigate a crisis. But I'm also a little excited today because she's a female. And so today we get the insight from a woman in how to navigate crisis as a sales professional or financial professional.

As a matter of fact, our first question was posed by Erin Pruetz, our Director of Communication, on that very issue.

Erin Pruetz: Karen, we want to talk about the all-female team that you've assembled. Tell us what that experience has been like.

Karen: Well, I've been wholesaling for 15 years and I've had many internal wholesalers that have worked for me. I've had schedulers that have worked for me. And I've had bosses that have worked for me. And, right now, outside of my boss -- my boss is male, of course, because that's the industry -- but my immediate team is female.

So I'm really excited to have this all-female team. Nothing against working with a male internal, but female internals seem to just have a better demeanor on the phone. Most people aren't going to be rude to a female that calls them. Where I think guys kind of tend to maybe get at it a little bit if things are not copacetic. Where a male advisor talking to a female intern is probably going to be a little bit nicer.

Also, in the industry, we like it as a female team. We bond together, we're excited about it. We're like, "Go girls! Go ladies!"

So there's just a little bit of camaraderie with that as well. I can drive that with my internal. I can drive that with my scheduler, like, "Come on, let's beat the boys!"

Gil: Karen's comments bring to mind some humor that I like, Mitch. For example, I think it was Margaret Thatcher, the former Prime Minister of the United Kingdom, who said, "If you want something said, ask a man. If you want something done, ask a woman."

Mitch: Better yet, ask my wife.

Gil: Unfair! But we'll take the humor!

Mitch: I love it. Again, like I said at the introduction, but just having a female voice is so refreshing. I get the joy every day of showing up to work as one of the owners, co-founders of Executive Scheduling Associates, running alongside Keri Gentry. So definitely different, yes, I get to see that every day in my marriage, I get to see that every day again when I show up to work with Keri. I love the value of the perspective that I get from Keri really stepping in and

helping lead the company as co-equals. I know that if I do this on my own, I'm going to get one side of it. She often brings a perspective that I know, because we're leading together, and we happen to be male and female that we actually lead stronger than we would if it was either one of us alone.

Gil: Lest people begin to think, Mitch, that the two of you are married, maybe you should explain your relationship.

Mitch: That's right, exactly. Keri is my sister. So we decided to go into business together 14 years ago. I know that many...

Gil: Now that's trouble, isn't it? Isn't the common advice "don't go into business with your family?"

Mitch: Well, yeah, I think a lot of people would say "never mix business and family," but there's been no greater joy that I've had in really doing work together. We've allowed the covenant relationship to rule over anything else.

Gil: What's a covenant relationship?

Mitch: A covenant relationship would really be that you're allowing the law of love to rule the relationship, rather than the love of law. So covenant versus contract. I think a lot of businesses start up in partnerships based on a contract relationship -- we're a partnership, we're a legal entity. But before the legal entity is a contract of love that says, "we're in this together and we're going to do this based on the law of love before we allow legal things to form our decisions."

Gil: Well let's move on to our second clip from our interview with Karen. As I recall, the set up for what you're about to hear was a question about when crisis hits, what's your first strategy as a professional?

Karen: Our job as wholesalers is to obviously keep our clients happy and also get out and prospect and bring in new clients and new business. And quite frankly, during a time like this that we're experiencing, prospecting is going to be very difficult. So my first thought was, "Well, I need to touch base with those clients that know me." And I've been wholesaling for 15 years so I've got a pretty good list of folks that I can get on the phone with and talk to.

And so the first strategy was, "I need to get out and talk to my producers." So my immediate producers, the last 12 months. My scheduler and I got that list together, we put together the scripts that we wanted to say in the email to drive that concern. And also, very short conference calls. Ten minutes. "Karen needs to talk to you for you ten minutes." And I think that was important because everyone's on that same bandwagon with, "WebExes and conference calls are what we need to do."

So I didn't need to take a lot of their time. Just very direct, to the point, this is what's going on. Check in.

Then after we went through all of those folks, then it was like, "Okay, let's now talk to the fallen producers." So those folks that know me, that have done business, but maybe they did business a year or two ago. I think we went back maybe three years and pulled that list. And that was

also very successful. So we were getting anywhere from seven to nine conference calls back-to-back all day.

It's a lot of calls. I'm actually now talking to more people than I would drive and go see on a day-to-day basis for face-to-face appointments.

Gil: You're kidding me?

Karen: And then that's kind of started to die off, so my scheduler and I and internal, we kind of, "Okay, what's the next phase?" And then we had a product change May 1, so it was "Okay, let's go back and talk to all the people I talked to a month ago to make sure they got the product change."

And then now we're focusing on the newer advisor that maybe wasn't around in 2008, certainly not around during a 9-11 timeframe, honing in on my experience of having been through several bear markets. Now I'm going to help you, Mr. Advisor, position this solution via phone. That's a different world.

Gil: Mitch, I found my imagination switch turning on as I was listening to Karen. I could hear her saying "we're going to get this through. Just follow my lead." What thoughts went through your mind?

Mitch: I can see her in action as well. She's kind of painting the picture where it's easy to not just hear her on the podcast, but actually see it in your mind. And I agree with you, she's making all the right moves, right? Kind of like Ruby Roundhouse in the movie *Jumanji*. Where she gets just dropped right into the wild, this new scene, she's never really been there before and she's having to navigate it. Her leadership instincts remind me of some key principles you'd actually learn if you were to read a survival guide or how to survive in the wild. In fact, the book, *How to Survive Anything* by Tim Macwelch and *Outdoor Life* -- there's tons of principles in there that, if you were to actually read a how to survive book, you could transfer those into most leadership scenarios in a crisis and they actually are parallel. They work!

Gil: For example?

Mitch: For example, in a previous life, I was a camp director, right? One of those wild times of my life. I've directed so many types of events like weekend retreats, winter camps, summer camps, including outdoor backpacking trips, right?

Gil: These are like junior highers?

Mitch: Every age group from junior high all the way up to adult. I did pick up a few tips along the way. But just a little disclaimer, first of all, before you get in your mind's eye, me in a rugged suit, looking like Bear Grylls...that's not the picture. These weren't rugged, survival-skill, backpacking trips. These were real low-level adventure trips designed to build teambuilding as much as possible, rather than survival skills. But I can tell you this: I do know how to build a campfire, I can make a mean s'more, and I did learn a few things along the way even though I may not be Bear Grylls. And some of those principles that I learned would be this.

The first thing is if you get lost in the woods or in the wilderness or in the wild: stop moving forward. It might feel counterintuitive to you, but it's the smartest thing you can do in that moment of crisis and uncertainty is to actually stop moving forward for a moment.

I remember one trip that I lead with the team of about 50 high schoolers on a three-day backpacking trip up into the Sierra Nevadas, some of the most beautiful scenery, but also some really rugged areas, some spots where it's really unknown, you've never been before and you're in the middle of the forest. And sometimes you don't know where you are. We would always break the group into smaller teams of about five or six, we'd pass out these bright orange safety whistles to each participant and then we'd pull them together to cover a few safety tips, some ground rules, just to make sure that everyone that went up the mountain got back down the mountain safely, wanting to make sure they got sent home the way they came to our program.

In fact, the instructions on what to do if a team or a person were to get lost was stop moving. And then call for help by blowing their emergency whistles every few minutes and wait for help to arrive to lead them back to safety.

So during this trip, we lost a team and it was a scary moment. During one of the days, we'd do a day hike up to a really tall peak called Pilot's Peak and the teams hiked together and when they get to the top of this peak, they enjoy lunch together. They take beautiful pictures as teams over beautiful horizons, a 360 view of all of Northern California. It's really beautiful.

But then as the day starts to wind down, the teams make their way back to base camp as teams back home. So as leaders, we get to base camp first, we're starting to count these teams coming in and we realize that one team is lagging behind. And as we begin to look at the amount of daylight that was left to where we were in the moment, we decided this team is lost, we need to jump up and get into action.

And after a couple of hours searching for them, moving back up the mountain, we found this team. And a big reason why we found them is because they actually took our advice and stopped moving forward when they realized they were lost.

Gil: So connect the dots back to Karen. You said that something in Karen's story reminded you of these hiking principles.

Mitch: Right. So Karen's not lost in the middle of the Sierra Nevada Mountains with an orange whistle tied around her neck. But she is in a crisis. COVID-19 created such market volatility that it has a lot of professionals feeling lost these days. Somewhere than other than where they might have set out to be at the beginning of the year.

But what is Karen doing in this moment? One of the first things she does...she stops prospecting. She stops moving forward. She stops trying to gain new ground, to take a breath, assess her situation, and gain her bearings. This isn't failure, this isn't quitting on her growth strategy. It actually takes a lot of guts to admit that you don't know where you are or you've never been here before as a leader, especially in a crisis. I think the temptation as leaders is sometimes we feel like we have to know all the answers. And so we might forge ahead with this sense that we've got to act like we know what we're doing.

Karen has the resolve and the security in her leadership to be able to pause, take a breath and

realize this is not the time to keep moving forward. We're in a crisis, so I need to actually pivot and lean into other strategies rather than continuing moving forward.

Gil: What other principles or what other steps do you see her taking that are transferrable in general to leadership?

Mitch: The second one that I learned in backpacking that tying yourself to others in your group just may save your life. A common safety measure that you learn when you're leading groups out in the wild is that crossing dangerous obstacles as a group is actually safer than trying to navigate them alone. Like if you happen to need to cross a deep river or climb a steep peak, one of the practices is that, as a group, you would form a line and that you would tie yourself to the person in front of you and you would tie yourself to the person in back of you, believing the strength of the group is actually greater than the strength of any one individual.

So the group, in a sense, protects each individual person from potential harm if the ground were to crumble beneath their feet or under someone else's feet in the group.

So I have a friend who hikes a lot and he tells me a story of how he saved a man's life because they were tied to each other while they were hiking in a treacherous situation. He says they were crossing between two peaks along a saddle and he said there was a point where it was so narrow, so thin, he described it like a razor's edge. So he and his partner decided to tie themselves to each other because they felt they were beginning to cross something that was a bit treacherous and uncertain. A few minutes in, his partner ends up losing his footing and begins to fall face-down the side of one side of the mountain. And my friend had the wits about him to jump to the other side and because they were tied together the tension of the rope actually saved his friend from a fall. And he tells me that if they weren't tied together he knows his friend would have fallen to his death.

So in a sense, this is what Karen's doing in this crisis. She's tying herself to her community, her group, those closest to her. She's partnered with her scheduler, Ashley -- who we love Ashley here -- she's leaning into Ashley saying, "Hey...what do we need to do to remain closest to those in our group? Our clients doing business." So she creates a strategy in a sense, with her top producers. And then if you listen to her, she's kind of moving out from the tight circle to the next group, just to say, "Hey, I'm tied in and I'm ready to navigate this crisis with you."

In a crisis, stay connected to your community. The group of people you know, who you trust, your peeps. The question is this: Who are the people you are tied to in life? Your family and your business. Lean into them, navigate those crises together and you'll be better for it.

Gil: Well let's move onto one final clip. I think what happened in this next section of our interview was a little bit personal. We acknowledged that leaders are the same as followers when a crisis hits. People like you, Mitch, feel anxiety. You feel nervous. The question is, "What does a leader do with that anxiety and that momentary confusion?" Here's Karen.

Karen: You know I personally have been through several of my family members that have had cancer and worked with them for years through the situation. I really tend to just put my management hat on and say, "You know, we have a crisis right now."

It's kind of like that military General or leader that takes their troops through a war scenario. Someone has to put that hat on and say, "Okay, follow me because I'm going to navigate you through this storm, but these are the things that have to get done so that we can get to the other side."

That's how I navigate it.

I get the occasional migraine that makes me nauseous. And in the morning I get up and I go and I don't want to. I'm tired, but I get up, I get on the phone, I work through those conference calls that things are okay, your clients are okay and this is how we're going to help them navigate through this volatility. I have a solution for you.

Gil: Is that the approach to life that you picked up from your folks?

Karen: I think so. Put the General hat on and these are the things we have to do. Check the list, we've got to get going, we've got to get things done. And this is what needs to happen.

You know, I worry in private probably, but we've got to keep going. When the going gets tough, the tough get going.

Gil: I love that, Mitch. She's said, "I might worry a little in private, but in public 'Let's go, let's go!'" What thoughts went through your mind?

Mitch: I think what I see her doing naturally is she's leaning on the things that she feels most comfortable with. The things that are bringing her the most success over a period of time. In fact, she goes back and references kind of her childhood. She grew up in a military home. When the going gets tough, the tough get going. I think the principle there is that, in a time of crisis, that's not the time to try new things. It's actually the time to lean on the tried-and-true principles that have found you success over the years.

Now that may be different for different people. So what we hear Karen saying, "Yeah, I do have moments when I worry, but when I walk out of the front door, I've got to drive this thing, I've got to lead through this thing," and that works for her and that's awesome -- she's successful at it. That may or may not work for every leader, but the key is going inside to really lean on the things that you know are going to help you navigate. They are proven success strategies in your leadership. And again there's so many of those, and we're all uniquely wired, we all have different strengths, we all have different talents, personalities, approaches. And so we have to be willing to allow diversity there. But the key would be don't try something new that you're not familiar with. Don't try to fake it. Lead from the place of ownership and you're probably going to find the best success with that strategy.

Gil: Take us behind the veil, personally. Surely you feel some anxiety as well.

Mitch: Sure, absolutely.

Gil: What do you do in those moments so that you can step out of your private place and lead?

Mitch: Well that's a very personal question. We talked about this a bit in episode 1 and that's just the general sense that we believe or we know that crisis doesn't create behavior, it reveals

it. So we see Karen...she's going to a default mode. She's in a crisis and she's going to places that she's familiar with. For me, when I start to feel I'm in over my head, I have find a source of anchoring that's actually deeper than the voices surrounding in the crisis.

And so for me, what that looks like...I'm praying. I'm waking up in the morning and I'm reading my Bible, I have my journal there and I'm just there, praying again in that deeper place, trying to get the peace in me so that when I walk out my door I can actually speak to those storms, those words, "Quiet. Be still," and lead from a place of calm rather than reacting to the voices that might be around me.

Gil: You've been listening to the fourth in series of five podcasts that we're calling *Navigating the Business Storms of Crisis*. Presented by Executive Scheduling Associates.

Next time, "Building Partnerships that Thrive." Join us again.