Welcome to Retreat #2 for Management as a Calling. Where the first retreat focused on helping you discern your calling through the development of your Personal Mission/Purpose Statement, this retreat will focus on ways to put that calling into action in your life. As such, this retreat has three goals: (1) to further clarify your purpose and calling, (2) to develop skills and techniques for staying true to that calling after leaving the safe confines of the University, and (3) to develop skills to help others find their calling.

This booklet will provide (1) program background and logistics, and (2) readings to be completed before the retreat April 5-7, 2024.

Plan to be in Blau Colloquium at 11:00am on Friday, April 5, 2024 with your luggage, sleeping bag/bedding and other items (see packing list below). You will return to Ross around 5:00pm on Sunday, April 7, 2024.

**Second Retreat Location and Details**
YMCA Camp Nissokone  
6836 F41  
Oscoda, MI 48750  
Executive Director: Ryan Mertz  
Email: rmertz@ymcadetroit.org  
Facility Phone Numbers: 989-739-2801; 810-936-4366  
Facility Webpage: [https://ymcadetroit.org/nissokone/](https://ymcadetroit.org/nissokone/)

**What to bring:**
- This welcome booklet  
- Your journal from the first retreat  
- Your exercise booklet from the first retreat  
- A physical copy of your Personal Mission/Purpose Statement  
- A physical copy of your Letter to your Future Self

**What not to bring:**
- Cell phones, computers or other tools for connecting to Wi-Fi, cellular or the internet.  
- Alcohol or drugs.  
- Cigarettes or vaping, Camp Nissokone is smoke free.
Full packing list:

**Required**
- Writing implements and a note pad
- Blankets or sleeping bag, sheets, pillows, towels, washcloth, soap (hand and bath), toiletries, etc.
- If you have allergies, bring your prescription and/or epi pen and inform Professor Hoffman and a teaching assistant.
- Clothes that can be worn in layers and get dirty/stained/torn.
- Long pants, ideally several pairs that can dry quickly.
- Sweatshirts/long sleeve shirts.
- Jacket, coat, raincoat, rainpants, umbrella and/or poncho
- Shoes, hiking shoes that can get wet/dirty

**Recommended**
- Clothes, mat or towel for yoga (optional)
- Heated blanket/throw with automatic timer to shut off
- Flashlight, back pack, day pack
- Insect repellent (not likely, but who knows)
- Water bottle/Travel mug (help us reduce disposable coffee cup waste!)
- Sunglasses
- Alarm clock
- Shorts (not likely, but again, who knows)
- Baseball cap /sun hat
- Games/playing cards
- Recreation gear (frisbee, running shoes, etc.)

In an emergency, family or friends can call or email Professor Hoffman (617-285-0920; ajhoff@umich.edu) and the facility phone numbers (above).

**Schedule**

**Pre-Retreat:**
- Please read the Assigned List of Readings attached to this document.
- You will also be sent a survey separately. Please fill it out prior to the weekend and after you read your Letter to Your Future Self.

**Retreat:**
**Friday, April 5:**

**11:00-11:30**
**GENERAL RAMP UP AND REENGAGEMENT** (Blau Colloquium)
The three goals of this retreat are: (1) to further clarify your purpose and calling, (2) to develop skills and techniques for staying true to that calling upon graduation, and (3) to develop skills to help others find their calling.

**11:30-12:15**
**INSPIRE YOUR CALLING IN BUSINESS**
Discussion with Vic Strecher, University of Michigan professor and author of *Life on Purpose: How Living for What Matters Most Changes Everything*

**12:15-1:00**
Lunch

**1:30-4:30**
Drive to Camp Nissokone, Transport by commercial motorcoach.
Continued Exercises, Reflection and Discussion on bus.

**5:30-6:30**
Dinner
**Peer Coaching**

Peer coaching can be a useful tool to help peers navigate and explore personal and professional development goals. After the first retreat, we thought it was important to start this second gathering with some tools and skills to help each of us guide others in developing our callings.

8:30
Formal program ends for the evening, Casual time around the campfire

**Saturday, April 6:**

<table>
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<tr>
<th>Time</th>
<th>Activity</th>
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<tbody>
<tr>
<td>6:45-7:30</td>
<td>Yoga (optional)</td>
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<tr>
<td><strong>8:00-9:00</strong></td>
<td>Breakfast</td>
</tr>
<tr>
<td>8:30-12:30</td>
<td>Reengage with your Personal Mission Statement</td>
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**Tactics and Strategies for Staying True to Your Calling**

You are about to enter the workforce and your sense of purpose or calling will be tested. As Dwight D. Eisenhower said, “every battle plan is perfect until you meet the enemy” or Mike Tyson said, “everyone has a plan until they get punched in the face.” What tactics will you use to stay on track with following your calling? We will discuss many options, offer ideas, draw from readings and hear from a panel of Ross alumni who have found ways to continue on their path.

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<tr>
<th>Time</th>
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<tbody>
<tr>
<td>12:30-1:30</td>
<td>Lunch</td>
</tr>
<tr>
<td>12:30-5:30</td>
<td>Tactics and Strategies for staying true to your calling</td>
</tr>
<tr>
<td>5:30-6:30</td>
<td>Dinner</td>
</tr>
<tr>
<td>6:30-8:00</td>
<td>Communicate your Personal Mission Statement</td>
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It's one thing to write your personal mission statement down on paper. It is another to communicate it to others. In this evening session, you will be given the opportunity to explain your calling in whatever medium or mode of communication you prefer: words, images, movement, song, whatever works to communicate your idea of your personal mission in life.

8:00
Formal program ends for the evening, Casual time around the campfire

**Sunday, April 7:**

<table>
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<th>Time</th>
<th>Activity</th>
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<tr>
<td>6:45-7:30</td>
<td>Yoga (optional)</td>
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<td><strong>8:00-9:00</strong></td>
<td>Breakfast</td>
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<tr>
<td>9:00-11:30</td>
<td>Visioning</td>
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<tr>
<td>9:00-12:00</td>
<td>In this final session, we will use visioning exercises to help you examine what kind of person you aspire to be, what kind of world you aspire to live in and what structures you will create to build both. We will also use this time to reflect on all we have done in these retreats and all you are about to do in your life.</td>
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<tr>
<td>12:30-1:30</td>
<td>Lunch</td>
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<td>2:00-5:00</td>
<td>Drive to Ann Arbor, Transport by commercial motorcoach.</td>
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Post-Retreat:
1. Send your Letter to your Future Self to be received by April 30, 2025.
2. Submit your 1-page Personal Mission Statement (or longer if you wish), including an action plan for staying true to that mission, on Canvas by April 30, 2024. This is for your benefit, a chance to put down on paper your revised sense of what you intend to do with your life.
3. You will receive a survey to ascertain your experience with the retreat so as to make necessary adjustments and increase the impact and success of this program.
4. We will reach back out in the summer of 2025 for a final follow-up virtual retreat and tuneup.

Academic Integrity and Community Values

Personal integrity and professionalism are fundamental values of the Ross School community. Though we will not be in Ann Arbor, abiding by the Ross Community Values are still expected and you should be familiar with and understand the Ross School’s Statement of Community Values, the Ross School Academic Honor Code, and the Ross School Code of Student Conduct including all campus public health policies. In light of COVID, our community has enhanced the Code of Student Conduct to include our commitment to each other and adherence to campus and School public health policies. Each of these, including a Statement of Student Rights and Responsibilities, may be found in the Ross School Impact on Ross Community Values. In addition, every student at the University of Michigan accepts the rights and responsibilities of membership in the University’s academic and social community. These rights and responsibilities are clearly laid out in The Statement. By enrolling in this program you confirm that you have read and understood these statements and policies, and further that you agree to abide by them. Any violation of the Ross School Academic Honor Code will be referred to the Community Values Committee. Possible penalties include dismissal from the program and a permanent notation of an honor policy violation on your transcript and even expulsion.

Office Hours

Professor Hoffman will be available for office hours at a time that is mutually agreeable to your calendar. There are 5 Teaching Assistants who are also available for one-on-one sessions. All of us are to be used as sounding boards to test ideas, work through blockages or solicit guidance. You are strongly encouraged to take advantage of these resources.

Advance Readings

You are being provided with the following materials to be read BEFORE the weekend retreat on April 5-7, 2024. Please read these at a relaxed pace, gathering the information presented but also the spirit with which it is presented. The assigned book (Life on Purpose: How Living for What Matters Most Changes Everything) is written by a professor at the University of Michigan's School of Public Health and its Director for Innovation and Social Entrepreneurship. It a very comprehensive text, linking the idea of purpose to living a more fulfilling life and offering tips and skills for finding and keeping aligned with your calling.
The assigned articles are in the back of this booklet. The 1-hour video by famed anthropologist Wade Davis offers numerous valuable insights into finding your purpose and calling. Be patient; he drifts off on tangents occasionally, but core elements of his message are powerful. The Management and Business Review reading is an interview with Paul Polman, former CEO of Unilever. The article by Deb Meyerson will help inform our discussion on Saturday afternoon regarding skills and techniques for staying true to your calling. Lastly, the articles by Bronnie Ware and Kasie Hunt warn of the pitfalls for not pursuing what really matters to you and the revelations that can come from facing your own mortality.

Assigned Book:

Assigned Articles:
- Davis, W. (2020) “Give your destiny time to find you,” *Creative Mornings*, September 4. This is a video: [https://www.youtube.com/watch?v=ZyjNgnFOmyU](https://www.youtube.com/watch?v=ZyjNgnFOmyU)

Program Personnel

Program Faculty Lead:
- **Andrew (Andy) Hoffman** (ajhoff@umich.edu; Office Phone: 734-763-9455; Cell Phone for emergencies: 617-285-0920; Room R4390, Ross School) is the Holcim (US) Professor of Sustainable Enterprise, a position that holds joint appointments at the Ross School of Business and the School for Environment and Sustainability. His work and his calling focus on finding solutions to our sustainability challenges, notably climate change and other environmental challenges, through the market and business. Prior to academics, and while he was searching for his calling, he quit his job as a chemical engineer for the US Environmental Protection Agency and spent five formative years building custom homes. The notions of calling and vocation animate all of Andy’s teaching and research, forming a central aspect of his idea of what it means to be a professor. Andy holds a B.S. in Chemical Engineering from the University of Massachusetts at Amherst and a MS and PhD in Civil Engineering and Management from the Massachusetts Institute of Technology.
Teaching Assistants:

- **Akbar Arsiwala** (arsiwaak@umich.edu) Akbar is a second-year MBA student who’s passionate about the intersection of sports, coaching, and youth mental health. He serves as the VP of Youth Mentorship for the Detroit Initiative of Ross and leads Action-based Learning for FitX, Michigan Ross’ premier health & fitness industry club. Before Ross, Akbar served as the Midwest Region Program Manager for the Travis Manion Foundation, a nonprofit providing veterans with community service opportunities upon transition from service. His proudest accomplishment was building and scaling a food insecurity relief operation in Chicago, providing over 100 tons of groceries to over 4,600 families. Akbar also served as an Officer in the U.S. Navy, where he learned the tenets of servant leadership, how to persevere through challenges and the value of pursuing one’s calling. Akbar holds a B.S. in Political Science from the United States Naval Academy and a minor in Arabic. He’s deeply committed to helping others navigate adversity and become the best version of themselves.

- **Jill Dannis** (jdannis@umich.edu) is a third-year MBA/MS in Environment and Sustainability Behavior, Education and Communication candidate through the Erb Institute. Prior to graduate school, she worked for eight years in the nonprofit sector across a variety of mission areas, including suicide prevention and crisis services for LGBTQ+ youth at The Trevor Project, higher education scholarships and leadership development for LGBTQ+ students at Point Foundation, and early talent development, diversity, equity and inclusion at the Academy of Motion Picture Arts and Sciences. She has designed and facilitated leadership development and mentorship programs as well as built and led identity-centric affinity groups. Jill has also been invited to speak at retreats at her alma mater for undergraduates to engage in discernment about their post-graduation plans. She believes in following one’s passions and values to chart a career path, however winding it might be. Jill holds a B.A. in Sociology with a minor in Environmental Studies from Loyola Marymount University.

- **Ashley (Ash) Martinez** (ashemart@umich.edu) is a third-year dual degree student pursuing her MBA with a concentration in Global Operations and a MS in Environment and Sustainability with a focus on Sustainable Systems. Ashley is passionate about using sustainability solutions to increase equity and accessibility in the food sector and built environment. Prior to graduate school, Ashley spent 5 years working in strategy and operations consulting at Deloitte Consulting LLP in Seattle, WA. She’s helped Fortune 500 and mid-size enterprise clients across numerous industries (food and beverage, retail, consumer product goods, defence, technology, healthcare, and nonprofit) to improve supply chain and operational performance as well as team dynamics, organizational design, and talent development. She launched and managed the Seattle office inclusion council and designed Deloitte’s national DEI recruiting model. For the summer of 2023, she is interning with Mars Petcare in Franklin, TN as a Strategy and Customer Development Intern. The previous summer, she interned with MillerKnoll Inc. through the Tauber Institute for Global Operations where she developed an inventory management model for the newly merged organization. She currently serves on the University of Michigan's President's Advisory Committee on Labor Standards and
Human Rights as well as the Michigan Farm to Institution Network Advisory Committee. In addition, Ashley is a Graduate Student intern with the Sustainability team in UM Dining and a part time Sustainability Consultant with the Impact Collective Group which provides ESG solutions to mid-size companies across industries. She is currently finishing up her DEI certificate through the Rackham Graduate School and Six Sigma Black Belt certification.

- **Michael O’Gorman** (mogorman@umich.edu) is a Michigan Ross class of 2023 alumnus and currently works as a senior strategy consultant at Deloitte based in New York City. Prior to business school, Michael was a senior strategist at the NYC Department of Education (NYCDOE, 2018-2021) where he was responsible for increasing student access to high quality seats. In this role he also founded the DEI Working Group in the Division of School Planning and Development which served as the pilot for professional DEI education across the NYCDOE. Before his tenure with the NYCDOE, Michael was a teacher and teacher leader with KIPP public schools in New York City and Washington, D.C. Michael remains deeply passionate about public education and using it to lift low-income students and families from poverty. He is also fascinated by the intersection of business, ethics, impact, and meaning which he explored while at Ross and recently as a FASPE Fellow in Germany and Poland. Michael believes a life worth living is one in service to others, rich with relationships, and with dedicated time and exercises for deep reflection. Michael holds a B.A. in Political Science from Moravian University, a M.Ed. in Curriculum and Instruction from George Mason University, a M.B.A. from the University of Michigan and is an alumnus of AmeriCorps and Teach for America.
• Madison (Maddie) Parrish (maddie.parrish@umich.edu) is a second-year MBA/MS dual degree student at the Ross School of Business and the School for Environment and Sustainability. Born in Battle Creek, Michigan, she grew up in Virginia and studied Economics and Communication Studies at Davidson College in North Carolina. Throughout her 10-year professional career in the global packaging industry before Ross, Maddie has experienced first-hand the challenges global brands face to reach their sustainability goals. She is passionate about the needed intersection of brand management, international business, and sustainability and seeks to learn strategies for influencing sustainable consumer behavior change. Through her graduate education, Maddie aims to learn how consumers view sustainability, what affects their decisions, and how to motivate their behaviors to benefit both the environment and business. She seeks to understand the strategies that can be used to influence consumers to pursue positive behaviors, such as recycling or purchasing sustainable products. She also seeks to learn how international brands can use their market and product influence to inspire this needed consumer behavior. After graduating, Maddie hopes to help global brands overcome sustainability challenges and positively influence consumer behavior. Maddie aims to identify a career path that aligns with her personal moral values and her desire to better this world and its environment while serving society. Her time at graduate school has encouraged her to thoroughly understand and appreciate her personal values and ambitions. Specifically, she has learned what truly motivates her and how she can create a personally fulfilling and enjoyable career while meeting her subsistence needs. She strongly believes that the personality and drive of an effective manager should be based on more than just the sole quest for financial rewards. Those in leadership positions can positively influence the individuals they lead and the world, society, and the environment around us.
Assigned Readings
Wade Davis: Give Your Destiny Time to Find You.

Source: https://www.youtube.com/watch?v=ZyjNgnFOmyU
In 2021, John Pontillo, Celia Bravard, and Andrew Hoffman conducted a series of interviews with Paul Polman, former CEO of Unilever. They discussed how business managers and leaders can build a new model of capitalism that serves the needs of society. Here’s what they learned.
business leaders stand at a tipping point. The market system is in crisis and the role they play within it is changing rapidly. The symptoms of this crisis are evident in both the social and environmental spheres. Income inequality has grown to an extent not seen since the Great Depression in the 1920s. Meanwhile, greenhouse gas emissions have increased exponentially since the beginning of the industrial revolution. Atmospheric concentrations of these gasses, now at their highest level since the Pliocene, three to five million years ago, are causing climatic changes likely to spur unprecedented social and economic consequences. A growing segment of the population blames modern capitalism both for causing these crises and for failing to correct them. Economist and Nobel Laureate Joseph Stiglitz has warned that the way we practice business today is exploitative and has created a vicious cycle: “Greater economic inequality is leading, in our money-driven political system, to more political inequality, with weaker rules and deregulation causing still more economic inequality.” He holds that capitalism needs to be saved from itself.

The systemic problems we are facing require systemic solutions and the market must provide them. The market – comprising corporations, government, and non-governmental organizations, as well as a throng of stakeholders including consumers, suppliers, buyers, insurance companies, banks, etc. – is the most powerful organizing force on Earth, and business is its most powerful component. Although governments are vital arbiters of the market, it is business that transcends national boundaries and has the potential to marshal the resources and coordination necessary to transform our world. “With its extraordinary powers of ideation, production, and distribution, business is best positioned to bring the change we need at the scale we need it.” Without business, solutions to the crises we face will remain elusive. It’s unlikely that business will find solutions without visionary leaders willing to challenge rigid norms and conceive a new model for corporate purpose.

To explore this new vision of the role of business in society and to understand what it means for tomorrow’s business leaders, we spoke with Paul Polman. Polman is the former CEO of Unilever (2009-2019) and was described by the *Financial Times* as “a standout CEO of the past decade...one of the most significant chief executives of his era [whose] approach to business and its role in society has been both valuable and path-breaking.” Early in his tenure as CEO, Polman ended quarterly financial reporting and earnings guidance, the publication of short-term financial expectations. He advised investors to take their money elsewhere if they were not interested in the company’s goal of creating long-term value and announced a bold plan to double revenue while halving the company’s environmental impact. During his ten year term, he acquired over fifty companies, fended off a hostile takeover bid by Kraft Heinz Co., raised total shareholder returns by 270 percent, and increased the global value of his brand from 1.9 billion USD in 2012 to 4.1 billion USD in 2019. He did all this during a decade in which stock market performance for the consumer goods industry nosedived from “outperforming the S&P 500 by 7.2 percentage points per year from 2000 to 2009 to underperforming by 2.8 percentage points per year from 2010 to 2019.” During this period, Unilever outperformed competitors like Proctor & Gamble, Johnson & Johnson, and notably Kraft Heinz Co., which has struggled.

To achieve Polman’s economic and environmental objectives, Unilever set out to decouple its economic growth from its environmental footprint through its Unilever Sustainable Living Plan (USLP) so as to increase the company’s positive social impact throughout its value chain. Initiated in 2010, this bold initiative transformed Unilever, using over seventy time-bound targets in three major categories: improving the health and wellbeing of over one billion people, reducing the company’s environmental impact by half, and improving the lives of millions. The USLP became a benchmark for corporate sustainability in terms of assessing the importance of goals, measuring their impact, and connecting a company’s goals with the UN Sustainable Development Goals, which Polman helped design.

Polman does not advocate dismantling capitalism; he believes that “business is here to serve society” and strives to reimagine capitalism as a force for good. Polman has never been one to hesitate at speaking or acting directly. Since leaving Unilever, he has set out to change both business and global markets. He has called capitalism “a damaged ideology” that “needs to be reinvented for the 21st century.” In a 2018 commencement address at George Mason University, he declared that “any system where too many feel they are not participating or are left behind will ultimately rebel against itself” and that “the world we want will only be achieved when we choose action over indifference, courage over comfort, and solidarity over division.” Polman does not advocate dismantling capitalism; he believes that “business is here to serve society” and strives to reimagine capitalism...
as a force for good. He has become a global advocate for a more responsible private sector, working with the United Nations, the International Chambers of Commerce and the social enterprise IMAGINE. In his recently published book, Net Positive: How Courageous Companies Thrive by Giving More Than They Take,²⁶ written with Andrew Winston, he argues the urgency of a net positive movement in which the private sector would rapidly step up its efforts to combat climate change and rampant inequality, prospering and reinventing itself in the process. In short, Polman argues that businesses profit most when they use their market activities to fix the world’s problems rather than creating them.

Who better to advise the next generation of business leaders who want to improve the world? While others are examining the problem of reimagining capitalism at the institutional level, we got to talk about how individual business managers and leaders can create a new model of capitalism that will serve all of society’s needs.

The Interviews

In three separate interviews in early 2021,²⁷ we spoke with Polman about how to remain true to your values while succeeding in a business system that often seems to oppose those values. Many who enter business today set out to create positive change in the world, but end up questioning how they can do that in a business culture that is fixated on shareholder value and often celebrates financial returns at almost any cost.

We found Polman invigorating and often blunt, a trait he attributes to being Dutch. He grew up in post-World War II Netherlands and his early interests and motivations explain a good deal about how he approaches the world and his life. “I never pursued a profession. I pursued a passion and a need, and hopefully, not knowing obviously, could I be good at it or not? I wanted to be a priest first, then I wanted to be a doctor. I actually ended up in business totally by serendipity.”

“If you’re privileged in any situation…then you have a duty to share that privilege with others, not to make that just your own privilege.”

A central motif of our conversations was the importance of recognizing your responsibilities and finding your purpose. “If you’re privileged in any situation…then you have a duty to share that privilege with others, not to make that just your own privilege; that doesn’t work. So, it gives you an obligation that comes with that privilege, and that obligation might be to share that knowledge, to put it to good use, to help transform systems for the better so that others get the same possibilities. That’s why we’re here. That is the essence of what makes a purposeful life.”

His keen awareness that not everyone has such privilege makes him all the more resolute in pursuing his purpose. “If you’re stuck in a textile factory in Bangladesh at eleven cents an hour, you’re stuck. It’s like many people live in modern day slavery, one and a half billion in outright poverty and probably three billion at less than five dollars a day. So, I’ve always felt that if you’re in a position to do something about that, you have to.” Polman feels that finding personal purpose, that drive and ability to do something about the problems in the world, lies at “the intersection of what you are passionate about, what you are good at and what the world needs.... And if you are good at that, in a sense of using the system to put it to the service of others, then I think you will find that really sweet, sweet spot that also unlocks that energy, and you get into this virtuous circle.”

With that focus on purpose as a foundation, we uncovered four main themes from our interviews that can guide the next generation of management professionals:

1. Establish a Mission to Serve Humanity
2. Build a Collective Vision for Your Company
3. Create an Ecology of Systems
4. Transform Systems to Enable Others to Pursue Their Purpose

Establish a Mission to Serve Humanity

Polman believes that business must benefit humanity and that every business should ground its purpose in service to others and to the planetary ecosystems on which we all depend. When the actions of businesses are driven by this broader purpose, constituents throughout society, from employees, customers and suppliers to local communities, NGOs, and ultimately investors, reap a wide range of benefits. When corporate actions take all into account, and all benefit, the company as a whole will thrive.

This is an important guiding philosophy for Polman, an avid proponent of the idea that business must aim to improve the welfare of society and, in so doing, build a stronger brand and a more profitable company. “Unilever’s incentive was actually not what you think. Unilever’s incentive was to show that business could be done in a different way. Recognizing that we also had to satisfy the shareholders, but if we would fail in the broader purpose, we would have failed the biggest experiment in mankind, because if the private sector wouldn’t change, mankind wouldn’t function.”

“Brands with purpose grow; companies with purpose last; and people with purpose thrive.”
Unilever strove to demonstrate that “brands with purpose grow; companies with purpose last; and people with purpose thrive.” The scope and ambition of the USLP made it a first-of-its-kind strategy, demonstrating a positive link between sustainability and successful business performance. Within the USLP, Unilever designated twenty-eight brands (as of 2019) as Sustainable Living Brands, “that communicate a strong environmental or social purpose, with products that contribute to achieving the company’s ambition of halving its environmental footprint and increasing its positive social impact. While all of Unilever’s brands are on a journey towards sustainability, our Sustainable Living Brands are those that are furthest ahead.” Some of these brands are: Dove, which has actively participated in the self-esteem education of over thirty-five million young people around the world since 2005; Lifebuoy, whose handwashing campaigns have reached one billion people; Vaseline, which has brought skin healing programs to three million people living on the front line of poverty and disaster; Ben & Jerry’s, which campaigns for social justice and climate change; and Rin, whose campaigns for social justice and climate change and career fairs to women across rural India. In the words of Polman’s successor, Alan Jope “We believe the evidence is clear and compelling that brands with purpose grow. In fact, we believe this so strongly that we are prepared to commit that in the future, every Unilever brand will be a brand with purpose.”

Created with the knowledge that “two-thirds of consumers around the world say they choose brands because of their stand on social issues, and over 90 percent of millennials say they would switch brands for one which champions a cause,” Unilever’s purpose-led Sustainable Living Brands have outperformed its traditional brands, growing 69 percent faster and contributing 75 percent of the company’s overall growth. Lifebuoy brand’s global handwashing campaign “was not only advantageous for public health, but also for revenue. In the 2010s, the category was growing at double digit rates, which is nearly unheard of for the soap space.”

Polman’s philosophies on purpose at a system, corporate, and personal level pioneered changes that have begun to proliferate. Business groups like the Business Roundtable, the World Economic Forum, and BlackRock have begun to challenge the primacy of shareholder value and instead focus on redefining the purpose of a corporation as “serving society at large,” “investing in employees, delivering value to customers, and dealing fairly and ethically with suppliers and not just advancing the interests of shareholders” and “act[ing] as a steward of the environmental and material universe for future generations.” Yet while many of these recently published aspirations have yet to be put into practice, Unilever has a considerable record of turning these aspirations into demonstrable results.

“...unlike CSR [corporate social responsibility]-type purpose, but getting it into the culture, getting it into the behaviors, getting it into living these values that drive purpose, which is often the most difficult part. It’s not just a paper exercise and a slogan, but you have to start the company, and he said, ‘Make hygiene commonplace.’ So going back to the core, we came up with our purpose. ‘Make sustainability commonplace.’ Making sustainability commonplace is pretty powerful. And we define sustainability more broadly than just the textbook of recycling of plastics. For us, it was really a broader concept of environmental, human, social capital and all the other things.” Polman said, “This was the start of USLP.”

USLP grew from there. First, “Standards of leadership were developed at the corporate level between HR and the CEO office based on desired behavior we felt was needed, or to be honest, was missing.” The company then used a combination of human resource policies, careful organizational feedback, and external input to adapt these standards for all employees.
“You cannot address the issues of sustainability and a planet burning when people themselves are burned out. So, you cannot build a sustainable strategy by not being first sustainable.”

To really build a strong culture, though, Polman felt he needed to “get everybody to feel strongly what their purpose is, because then collectively we can work on the company purpose.” And to build a company culture around purpose, you need purpose-driven people with a sustainable mindset. “You cannot address the issues of sustainability and a planet burning when people themselves are burned out. So, you cannot build a sustainable strategy by not being first sustainable.” He explained, “I had everybody start working on their purpose. In the first year, we did this training for the top 100, and then the second year for the 500 and then you multiply. Because I had a three-year program designed, the first year was about defining your own purpose, the second one was about how you can use your purpose to influence others, and the third one was about achieving results. That was basically the cycle. And as you can imagine, any time you did one group, the next year you would start and then it became a multiplier, because the top 100 people did 500, and the 500 did 3,000. It took me three or four years to really start to see the needle move in Unilever.”

Still, Polman warns that there is “risk, even now, that it slips back if not continuously worked and reinforced” using the “employee performance review process and training,” coupled with “frequent story-telling and celebrations.” Polman revised the company’s standard review process so that each party was given a chance to review the other’s performance, instead of a superior simply reviewing a voiceless subordinate. And of course, changes in personnel supported these efforts. Polman feels confident that the development of a new culture at Unilever would have taken much longer “with the old guard who frankly had been too much associated with long term underperformance.” “Some people changed professions, some people left. Some people said, ‘I’m not really into this,’ and some said, ‘Well, I have a purpose, but I can’t find it here.’ And we had to help some of them, because they wouldn’t want to leave, but they wouldn’t be part of the long-term journey in the company. In fact, the reality is, I changed 70 of the top 100 people when I came, in a very short period of time, in a one- or two-year period.” New employees were chosen using new selection criteria rooted in the USLP.

And translating the USLP vision into practical actions and structures at all levels of the business was critical to the new culture. “If purpose is the broader intent of why you are there, values are how you make purpose come alive. So, for Unilever to make sustainable living commonplace, you share values.” Once this strong connection of shared purpose and values was embedded throughout the business, managers and their teams could orient all their actions toward it, like a compass toward the North Star. By managing people well, leaders empower their workers to fulfill this same purpose, even while they adapt to new societal, company, and employee needs.

Create an Ecology of Systems

Through all of these efforts, Polman continued to focus on first changing the broadest and most persistent problems within the system, not merely those he encountered directly. “Persistent problems are inherently difficult to define, interconnected with other problems, and nearly impossible to solve in isolation. Especially with the ever-evolving interconnectedness of supply chains, technology, and climate impacts.” “When companies partner with peers on low-risk efforts that make everyone more efficient and sustainable, they create space for tackling harder, more systemic problems. The benefits from working on system-level challenges are shared and realized by each place along the supply chain. Whether it be lower costs, lower risks, or increased returns, these activities are not only focused on the shareholder nor external partners.”

“You, as CEO, have to put yourself entirely to the service of others. You have to think about how you make others successful.”

Polman sees managing systems change as “the careful stitching and sequencing of things where you have to get departments on board, where you might have to move some people out, where you might have to change some behaviors or incentive systems. So, the ecosystem of a company is very delicate.” But individual managers, and especially CEOs, cannot work alone if they are to change complex systems. “You, as CEO, have to put yourself entirely into the service of others. You have to think about how you make others successful. Others being those in your multiple stakeholder model as much as your suppliers. Totally different supplier relationships
were developed in Unilever. Others are the citizens that you serve, the partnerships that you work with, be it the UN or be it other partnerships that you might find important... At the end of the day, my argument has always been that, in my life at least, it’s not about you or me. It is about us working in partnership on the issues that need to be solved.”

When Unilever brought the USLP to its Russian operations, for example, it built new infrastructure in order to increase their access to recycled packaging materials. But Russia’s tax policies stifled the development of viable supply chains for recycled material. Instead of advocating for private tax breaks or write-downs to pay for its investments in recycling infrastructure, Unilever advocated for legislative changes which would raise standards across the board and level the playing field. This led to the “development of state-of-the-art wastewater facilities at plants that eventually became the standard for Russia.” While a more self-directed strategy “would help the immediate bottom line and provide a short-term competitive advantage, it would not solve the systemic problems of the cost and availability of recycled materials.” Such advocacy is, of course, not entirely selfless; Unilever does benefit from a larger recycling system with lower costs. But so does every other firm in the country—a scale often necessary if we are to achieve systemic change.30

Polman has taken this thinking on systemic change even further in his current work with IMAGINE. There he brings corporate leaders from a variety of sectors together in what he calls “pre-competitive collaboration.” These transformative partnerships facilitate more rapid movement on issues such as climate change, paying workers a living wage, sustainable palm oil, and more by generating the necessary momentum to create tipping points in the market. Polman describes getting “CEOs moving as if their shoe-laces are tied together. Any individual CEO can only move so much farther ahead than the others. Even with the best practices and innovations, this is systemic and can’t be solved on an individual CEO basis.”31 He feels that the only way to get people to embrace this collective view and change the system is to build trust through transparency, shared objectives, and vulnerability, core tenets of the USLP.

“What’s the game we’re playing here? For whom are we playing it?” For Polman, humanity’s wellbeing is the game we should all be playing.

Transform Systems to Enable Others to Pursue Their Purpose

Through careful consideration of personal and corporate purpose, leaders can orient themselves and their companies toward a larger goal. A growing body of literature concludes that purpose-driven companies see a higher market share and better growth than their competitors.32 Peter Drucker wrote that, “The most successful company is not the one with the most brains, but the most brains acting in concert.” Jim Stengel added that “Nothing unifies a leadership team like a shared intention...The most deeply motivated people—not to mention those who are most productive and satisfied—hitch their desires to a cause larger than themselves.”33 Polman puts it another way, “At the end of the day, you need to ask what matters. What drives you?” “You join an organization for its purpose, I think, and you feel at home in an organization because of its values.” And in the end, “What’s the game we’re playing here? For whom are we playing it?” For Polman, humanity’s wellbeing is the game we should all be playing.

When Polman joined Unilever, he found the culture quite different from what he envisioned. “What they called caring was caring for themselves...The only way to get a promotion was not to perform, but to fight your way into a bigger job, that type of thing. And frankly, the salary and bonus performance were totally out of line, decoupled from the performance of the company itself, and people were pursuing their own purpose...it starts to affect people’s behavior. You don’t want to cooperate as much, you’re not so open, and you don’t have honest discussions. You don’t feel energized.”

Polman deliberately changed the trajectory of the company by getting everybody to bring their purpose, rooted in their values, to the workplace; to bring their whole self to their task. Once a purpose-centered culture was established at Unilever, he could “delegate authority to where the knowledge is, not where the authority sits.” Polman wanted to build not just managers, but leaders throughout the business. To do so, he diminished the importance of rigid, formal job descriptions, which can become static, “tick the box” exercises. “I’ve always been against job descriptions. I think that job descriptions make you managers and stifle you and make you do the minimum because it’s your job description, which is often heavily linked to incentives and compensations. I’ve always been against that because I felt companies change, environments change, the jobs are changing, and you need people that are flexible, that decide obviously
what is at the core of what they need to deliver. People need to be able to actually write their own job description.” He added that these people’s understandings of their jobs must evolve, not just to meet business needs, but in accordance with the ever-changing landscape in which the business operates. Once the company’s culture had developed collectively, its values informed performance metrics or incentives, and Unilever’s people felt empowered to put it all into practice; leaders shifted their focus to individual actions. Polman’s overall purpose was to make sustainable living commonplace by way of goals like detaching economic growth from environmental impact and yielding net positive societal effects. To achieve any of this he had to create bold, purpose-driven goals.

“I did the job totally differently than my predecessor, not in the good or bad sense, but in being yourself and shaping these jobs.”

Leading By Example
Polman is direct and honest about how he plans to live now that he is no longer a CEO. “When I was the CEO at Unilever, I don’t pretend to have been a good CEO or a bad CEO, but I can tell you I was a different CEO than most of my predecessors. And when I was the CFO in Nestle, I did the job totally differently than my predecessor, not in the good or bad sense, but in being yourself and shaping these jobs.” Now, “I’m not the ex-CEO of Unilever. I’m the future proponent who wants to make a difference in the world.” Polman continues to pursue his own purpose doggedly. In his words, it’s “a journey for life. You always continue to work on your purpose. I’m still working on that and it’s changing.”

If we intend to transform systems, our leaders must be bold. If we continue operating along the same pathways we will not arrive at different results. Polman says, “What we need is more courage...you need to feel uncomfortable. If you don’t feel uncomfortable, you don’t develop yourself, you don’t move systems, you don’t stretch people.” He is critical of many of the business norms which seem to be acceptable to leaders today. “Everybody can maximize [the value of] a company over three or four years. This is the game that’s being played. You squeeze them like a lemon for five years, then the new one comes in...blames the predecessor who’s left with enough money, gets a low base again, puts in write offs, which then the market celebrates because it needed to be done, restructuring, and starts again. Meanwhile, you don’t build any value.” He continued, “These leaders that are not courageous, they play it safe; they play it not to lose instead of playing to win, they will never go out of their comfort zone, they will never make a commitment unless they are 100% sure that they can deliver or probably already delivered on it, but it’s re-packaged and we call it greenwashing...they are oblivious to anything that’s going on around them in the real world. But it’s a sad life, in my opinion.”

He sees the next generation of business leaders as critical to this movement towards bolder action. Whether they be students in business schools or managers working their way up the ranks, he believes that they “think a little bit longer-term...and above all, they’re not afraid. For them, this has been the state of being and they want to change it. They don’t come from something they need to protect, it’s the opposite. They’re very open to adapt. Open in their mindset, open in their learning, open in working together, open in their ways and thinking in more purpose-driven models, which frankly, the previous generation did not have too much of. They have all these elements, and as a result, you also see a higher level of courage.”

“There’s hope guys, there’s hope. We don’t have to despair. I don’t believe in that. I’m an optimist.”

Polman’s message is clear: the next generation of business leaders will have to buck the practices and traditions that inhibit progress towards a future that creates value for both business and society. They must redefine success, intentionally align their values with their broader mission, and inspire others to join them. Courageous leadership, directed toward the benefit of humanity, is at the very heart of Polman’s call for a net positive movement in which industry leaders go beyond doing less bad and strive to do more good. These leaders will work with their peers, and with civil society and government, striving always to leave the world better than they found it. There are extraordinary opportunities out there for those who have the hope and the drive to make a difference. And hope is where Polman draws his energy. “There’s hope guys, there’s hope. We don’t have to despair. I don’t believe in that. I’m an optimist.”
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Endnotes

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Radical Change, the Quiet Way
by Debra Meyerson
October 2001

At one point or another, many managers experience a pang of conscience—a yearning to confront the basic or hidden assumptions, interests, practices, or values within an organization that they feel are stodgy, unfair, even downright wrong. A vice president wishes that more people of color would be promoted. A partner at a consulting firm thinks new MBAs are being so overworked that their families are hurting. A senior manager suspects his company, with some extra cost, could be kinder to the environment. Yet many people who want to drive changes like these face an uncomfortable dilemma. If they speak out too loudly, resentment builds toward them; if they play by the rules and remain silent, resentment builds inside them. Is there any way, then, to rock the boat without falling out of it?

Over the past 15 years, I have studied hundreds of professionals who spend the better part of their work lives trying to answer this question. Each one of the people I’ve studied differs from the organizational status quo in some way—in values, race, gender, or sexual preference, perhaps (see the sidebar 1 below “How the Research Was Done”). They all see things a bit differently from the “norm.” But despite feeling at odds with aspects of the prevailing culture, they genuinely like their jobs and want to continue to succeed in them, to effectively use their differences as the impetus for constructive change. They believe that direct, angry confrontation will get them nowhere, but they don’t sit by and allow frustration to fester. Rather, they work quietly to challenge prevailing wisdom and gently provoke their organizational cultures to adapt. I call such change agents *tempered radicals* because they work to effect significant changes in moderate ways.

In so doing, they exercise a form of leadership within organizations that is more localized, more diffuse, more modest, and less visible than traditional forms—yet no less significant. In fact, top executives seeking to institute cultural or organizational change—who are, perhaps, moving tradition-bound organizations down new roads or who are concerned about reaping the full potential of marginalized employees—might do well to seek out these tempered radicals, who may be hidden deep within their own organizations. Because such individuals are both dedicated to their companies and masters at changing organizations at the grassroots level, they can prove extremely valuable in helping top managers to identify fundamental causes of discord, recognize alternative perspectives, and adapt to changing needs and circumstances. In addition, tempered radicals, given support from above and a modicum of room to experiment, can prove to be excellent leaders. (For more on management’s role in fostering tempered radicals, see the sidebar 2 below “Tempered Radicals as Everyday Leaders.”)

Since the actions of tempered radicals are not, by design, dramatic, their leadership may be difficult to recognize. How, then, do people who run organizations, who want to nurture this diffuse source of cultural adaptation, find and develop these latent leaders? One way is to...
appreciate the variety of modes in which tempered radicals operate, learn from them, and support their efforts.

To navigate between their personal beliefs and the surrounding cultures, tempered radicals draw principally on a spectrum of incremental approaches, including four I describe here. I call these disruptive self-expression, verbal jujitsu, variable-term opportunism, and strategic alliance building (see sidebar 3 below “A Spectrum of Tempered Radical Strategies”). Disruptive self-expression, in which an individual simply acts in a way that feels personally right but that others notice, is the most inconspicuous way to initiate change. Verbal jujitsu turns an insensitive statement, action, or behavior back on itself. Variable-term opportunists spot, create, and capitalize on short- and long-term opportunities for change. And with the help of strategic alliances, an individual can push through change with more force.

Each of these approaches can be used in many ways, with plenty of room for creativity and wit. Self-expression can be done with a whisper; an employee who seeks more racial diversity in the ranks might wear her dashiki to company parties. Or it can be done with a roar; that same employee might wear her dashiki to the office every day. Similarly, a person seeking stricter environmental policies might build an alliance by enlisting the help of one person, the more powerful the better. Or he might post his stance on the company intranet and actively seek a host of supporters. Taken together, the approaches form a continuum of choices from which tempered radicals draw at different times and in various circumstances.

But before looking at the approaches in detail, it’s worth reconsidering, for a moment, the ways in which cultural change happens in the workplace.

**How Organizations Change**

Research has shown that organizations change primarily in two ways: through drastic action and through evolutionary adaptation. In the former case, change is discontinuous and often forced on the organization or mandated by top management in the wake of major technological innovations, by a scarcity or abundance of critical resources, or by sudden changes in the regulatory, legal, competitive, or political landscape. Under such circumstances, change may happen quickly and often involves significant pain. Evolutionary change, by contrast, is gentle, incremental, decentralized, and over time produces a broad and lasting shift with less upheaval.

The power of evolutionary approaches to promote cultural change is the subject of frequent discussion. For instance, in “We Don’t Need Another Hero” (HBR, September 2001), Joseph L. Badaracco, Jr., asserts that the most effective moral leaders often operate beneath the radar, achieving their reforms without widespread notice. Like-wise, tempered radicals gently and continually push against prevailing norms, making a difference in small but steady ways and setting examples from which others can learn. The changes they inspire are so incremental that they barely merit notice—which is exactly why they work so well. Like drops of water, these approaches are innocuous enough in themselves. But over time and in accumulation, they can erode granite.

Consider, for example, how a single individual slowly—but radically—altered the face of his organization. Peter Grant1 was a black senior executive who held some 18 positions as he moved up the ladder at a large West Coast bank. When he first joined the company as a manager, he was one of only a handful of people of color on the professional staff. Peter had a private, long-term goal: to bring more women and racial minorities into the fold and help them succeed. Throughout his 30-year career running the company’s local banks, regional offices, and corporate operations, one of his chief responsibilities was to hire new talent. Each time he had the opportunity, Peter attempted to hire a highly qualified member of a minority. But he did
more than that—every time he hired someone, he asked that person to do the same. He explained to the new recruits the importance of hiring women and people of color and why it was their obligation to do likewise.

Whenever minority employees felt frustrated by bias, Peter would act as a supportive mentor. If they threatened to quit, he would talk them out of it. “I know how you feel, but think about the bigger picture here,” he’d say. “If you leave, nothing here will change.” His example inspired viral behavior in others. Many stayed and hired other minorities; those who didn’t carried a commitment to hire minorities into their new companies. By the time Peter retired, more than 3,500 talented minority and female employees had joined the bank.

Peter was the most tempered, yet the most effective, of radicals. For many years, he endured racial slurs and demeaning remarks from colleagues. He waited longer than his peers for promotions; each time he did move up he was told the job was too big for him and he was lucky to have gotten it. “I worked my rear end off to make them comfortable with me,” he said, late in his career. “It wasn’t luck.” He was often angry, but lashing out would have been the path of least emotional resistance. So without attacking the system, advancing a bold vision, or wielding great power, Peter chipped away at the organization’s demographic base using the full menu of change strategies described below.

**Disruptive Self-Expression**

At the most tempered end of the change continuum is the kind of self-expression that quietly disrupts others’ expectations. Whether waged as a deliberate act of protest or merely as a personal demonstration of one’s values, disruptive self-expression in language, dress, office decor, or behavior can slowly change the atmosphere at work. Once people take notice of the expression, they begin to talk about it. Eventually, they may feel brave enough to try the same thing themselves. The more people who talk about the transgressive act or repeat it, the greater the cultural impact.

Consider the case of John Ziwa, a manager in the business development group of a high-growth computer components company. As a hardworking business school graduate who’d landed a plum job, John had every intention of working 80-hour weeks on the fast track to the top. Within a few years, he married a woman who also held a demanding job; soon, he became the father of two. John found his life torn between the competing responsibilities of home and work. To balance the two, John shifted his work hours—coming into the office earlier in the morning so that he could leave by 6 pm. He rarely scheduled late-afternoon meetings and generally refused to take calls at home in the evening between 6:30 and 9. As a result, his family life improved, and he felt much less stress, which in turn improved his performance at work.

At first, John’s schedule raised eyebrows; availability was, after all, an unspoken key indicator of commitment to the company. “If John is unwilling to stay past 6, ”his boss wondered,“ is he really committed to his job? Why should I promote him when others are willing and able to work all the time?” But John always met his performance expectations, and his boss didn’t want to lose him. Over time, John’s colleagues adjusted to his schedule. No one set up conference calls or meetings involving him after 5. One by one, other employees began adopting John’s “6 o’clock rule”; calls at home, particularly during dinner hour, took place only when absolutely necessary. Although the 6 o’clock rule was never formalized, it nonetheless became par for the course in John’s department. Some of John’s colleagues continued to work late, but they all appreciated these changes in work practice and easily accommodated them. Most people in the department felt more, not less, productive during the day as they adapted their work habits to get things done more efficiently—for example, running meetings on schedule and monitoring
interruptions in their day. According to John’s boss, the employees appreciated the newfound balance in their lives, and productivity in the department did not suffer in the least.

Tempered radicals know that even the smallest forms of disruptive self-expression can be exquisitely powerful. The story of Dr. Frances Conley offers a case in point. By 1987, Dr. Conley had already established herself as a leading researcher and neurosurgeon at Stanford Medical School and the Palo Alto Veteran’s Administration hospital. But as one of very few women in the profession, she struggled daily to maintain her feminine identity in a macho profession and her integrity amid gender discrimination. She had to keep her cool when, for example, in the middle of directing a team of residents through complicated brain surgery, a male colleague would stride into the operating room to say, “Move over, honey.” “Not only did that undermine my authority and expertise with the team,” Dr. Conley recalled later, “but it was unwarranted—and even dangerous. That kind of thing would happen all the time.”

*Even the smallest forms of disruptive self-expression can be exquisitely powerful.*

Despite the frustration and anger she felt, Dr. Conley at that time had no intention of making a huge issue of her gender. She didn’t want the fact that she was a woman to compromise her position, or vice versa. So she expressed herself in all sorts of subtle ways, including in what she wore. Along with her green surgical scrubs, she donned white lace ankle socks—an unequivocal expression of her femininity. In itself, wearing lace ankle socks could hardly be considered a Gandhian act of civil disobedience. The socks merely said, “I can be a neurosurgeon and be feminine.” But they spoke loudly enough in the stolid masculinity of the surgical environment, and, along with other small actions on her part, they sparked conversation in the hospital. Nurses and female residents frequently commented on Dr. Conley’s style. “She is as demanding as any man and is not afraid to take them on,” they would say, in admiration. “But she is also a woman and not ashamed of it.”

Ellen Thomas made a comparable statement with her hair. As a young African-American consultant in a technical services business, she navigated constantly between organizational pressures to fit in and her personal desire to challenge norms that made it difficult for her to be herself. So from the beginning of her employment, Ellen expressed herself by wearing her hair in neat cornrow braids. For Ellen, the way she wore her hair was not just about style; it was a symbol of her racial identity.

Once, before making an important client presentation, a senior colleague advised Ellen to unbraid her hair “to appear more professional.” Ellen was miffed, but she didn’t respond. Instead, she simply did not comply. Once the presentation was over and the client had been signed, she pulled her colleague aside. “I want you to know why I wear my hair this way,” she said calmly. “I’m a black woman, and I happen to like the style. And as you just saw,” she smiled, “my hairstyle has nothing to do with my ability to do my job.”

Does leaving work at 6 pm or wearing lacy socks or cornrows force immediate change in the culture? Of course not; such acts are too modest. But disruptive self-expression does do two important things. First, it reinforces the tempered radical’s sense of the importance of his or her convictions. These acts are self-affirming. Second, it pushes the status quo door slightly ajar by introducing an alternative modus operandi. Whether they are subtle, unspoken, and recognizable by only a few or vocal, visible, and noteworthy to many, such acts, in aggregation, can provoke real reform.
**Verbal Jujitsu**

Like most martial arts, jujitsu involves taking a force coming at you and redirecting it to change the situation. Employees who practice verbal jujitsu react to undesirable, demeaning statements or actions by turning them into opportunities for change that others will notice.

One form of verbal jujitsu involves calling attention to the opposition’s own rhetoric. I recall a story told by a man named Tom Novak, an openly gay executive who worked in the San Francisco offices of a large financial services institution. As Tom and his colleagues began seating themselves around a table for a meeting in a senior executive’s large office, the conversation briefly turned to the topic of the upcoming Gay Freedom Day parade and to so-called gay lifestyles in general. Joe, a colleague, said loudly, “I can appreciate that some people choose a gay lifestyle. I just don’t understand why they have to flaunt it in people’s faces.”

Stung, Tom was tempted to keep his mouth shut and absorb the injury, but that would have left him resentful and angry. He could have openly condemned Joe’s bias, but that would have made him look defensive and self-righteous. Instead, he countered Joe with an altered version of Joe’s own argument, saying calmly, “I know what you mean, Joe. I’m just wondering about that big picture of your wife on your desk. There’s nothing wrong with being straight, but it seems that you are the one announcing your sexuality.” Suddenly embarrassed, Joe responded with a simple, “Touché.”

Managers can use verbal jujitsu to prevent talented employees, and their valuable contributions, from becoming inadvertently marginalized. That’s what happened in the following story. Brad Williams was a sales manager at a high-technology company. During a meeting one day, Brad noticed that Sue, the new marketing director, had tried to interject a few comments, but everything she said was routinely ignored. Brad waited for the right moment to correct the situation. Later on in the meeting, Sue’s colleague George raised similar concerns about distributing the new business’s products outside the country. The intelligent remark stopped all conversation. During the pause, Brad jumped in: “That’s an important idea,” he said. “I’m glad George picked up on Sue’s concerns. Sue, did George correctly capture what you were thinking?”

With this simple move, Brad accomplished a number of things. First, by indirectly showing how Sue had been silenced and her idea co-opted, he voiced an unspoken fact. Second, by raising Sue’s visibility, he changed the power dynamic in the room. Third, his action taught his colleagues a lesson about the way they listened—and didn’t. Sue said that after that incident she was no longer passed over in staff meetings.

In practicing verbal jujitsu, both Tom and Brad displayed considerable self-control and emotional intelligence. They listened to and studied the situation at hand, carefully calibrating their responses to disarm without harming. In addition, they identified the underlying issues (sexual bias, the silencing of newcomers) without sounding accusatory and relieved unconscious tensions by voicing them. In so doing, they initiated small but meaningful changes in their colleagues’ assumptions and behavior.

**Variable-Term Opportunism**

Like jazz musicians, who build completely new musical experiences from old standards as they go along, tempered radicals must be creatively open to opportunity. In the short-term, that means being prepared to capitalize on serendipitous circumstances; in the long-term, it often means something more proactive. The first story that follows illustrates the former case; the second is an example of the latter.
Tempered radicals like Chris Morgan know that rich opportunities for reform can often appear suddenly, like a $20 bill found on a sidewalk. An investment manager in the audit department of a New York conglomerate, Chris made a habit of doing whatever he could to reduce waste. To save paper, for example, he would single-space his documents and put them in a smaller font before pressing the “Print” button, and he would use both sides of the paper. One day, Chris noticed that the company cafeteria packaged its sandwiches in Styrofoam boxes that people opened and immediately tossed. He pulled the cafeteria manager aside. “Mary,” he said with a big smile, “those turkey-on-focaccia sandwiches look delicious today! I was wondering, though…would it be possible to wrap sandwiches only when people asked you to?” By making this very small change, Chris pointed out, the cafeteria would save substantially on packaging costs.

Chris gently rocked the boat by taking the following steps. First, he picked low-hanging fruit, focusing on something that could be done easily and without causing a lot of stir. Next, he attacked the problem not by criticizing Mary’s judgment but by enrolling her in his agenda (praising her tempting sandwiches, then making a gentle suggestion). Third, he illuminated the advantages of the proposed change by pointing out the benefits to the cafeteria. And he started a conversation that, through Mary, spread to the rest of the cafeteria staff. Finally, he inspired others to action: Eventually, the cafeteria staff identified and eliminated 12 other wasteful practices.

Add up enough conversations and inspire enough people and, sooner or later, you get real change. A senior executive named Jane Adams offers a case in point. Jane was hired in 1995 to run a 100-person, mostly male software-development division in an extremely fast-growing, pre-IPO technology company. The CEO of the company was an autocrat who expected his employees to emulate his dog-eat-dog management style. Although Jane was new to the job and wanted very much to fit in and succeed, turf wars and command-and-control tactics were anathema to her. Her style was more collaborative; she believed in sharing power. Jane knew that she could not attack the company’s culture by arguing with the CEO; rather, she took charge of her own division and ran it her own way. To that end, she took every opportunity to share power with subordinates. She instructed each of her direct reports to delegate responsibility as much as possible. Each time she heard about someone taking initiative in making a decision, she would praise that person openly before his or her manager. She encouraged people to take calculated risks and to challenge her.

When asked to give high-visibility presentations to the company’s executive staff, she passed the opportunities to those who had worked directly on the project. At first, senior executives raised their eyebrows, but Jane assured them that the presenter would deliver. Thus, her subordinates gained experience and won credit that, had they worked for someone else, they would likely never have received.

Occasionally, people would tell Jane that they noticed a refreshing contrast between her approach and the company’s prevailing one. “Thanks, I’m glad you noticed,” she would say with a quiet smile. Within a year, she saw that several of her own direct reports began themselves to lead in a more collaborative manner. Soon, employees from other divisions, hearing that Jane’s was one of the best to work for, began requesting transfers. More important, Jane’s group became known as one of the best training grounds and Jane as one of the best teachers and mentors of new talent. Nowhere else did people get the experience, responsibility, and confidence that she cultivated in her employees.

For Chris Morgan, opportunity was short-term and serendipitous. For Jane Adams, opportunity was more long-term, something to be mined methodically. In both cases, though, remaining alert to such variable-term opportunities and being ready to capitalize on them were essential.
Strategic Alliance Building

So far, we have seen how tempered radicals, more or less working alone, can effect change. What happens when these individuals work with allies? Clearly, they gain a sense of legitimacy, access to resources and contacts, technical and task assistance, emotional support, and advice. But they gain much more—the power to move issues to the forefront more quickly and directly than they might by working alone.

When one enlists the help of like-minded, similarly tempered coworkers, the strategic alliance gains clout. That's what happened when a group of senior women at a large professional services firm worked with a group of men sympathetic to their cause. The firm’s executive management asked the four-woman group to find out why it was so hard for the company to keep female consultants on staff. In the course of their investigation, the women discussed the demanding culture of the firm: a 70-hour work week was the norm, and most consultants spent most of their time on the road, visiting clients. The only people who escaped this demanding schedule were part-time consultants, nearly all of whom happened to be women with families. These part-timers were evaluated according to the same performance criteria—including the expectation of long hours—as full-time workers. Though many of the part-timers were talented contributors, they consistently failed to meet the time criterion and so left the company. To correct the problem, the senior women first gained the ear of several executive men who, they knew, regretted missing time with their own families. The men agreed that this was a problem and that the company could not continue to bleed valuable talent. They signed on to help address the issue and, in a matter of months, the evaluation system was adjusted to make success possible for all workers, regardless of their hours.

Tempered radicals don’t allow preconceived notions about “the opposition” to get in their way. Indeed, they understand that those who represent the majority perspective are vitally important to gaining support for their cause. Paul Wielgus quietly started a revolution at his company by effectively persuading the opposition to join him. In 1991, Allied Domecq, the global spirits company whose brands include Courvoisier and Beefeater, hired Paul as a marketing director in its brewing and wholesaling division. Originally founded in 1961 as the result of a merger of three British brewing and pub-owning companies, the company had inherited a bureaucratic culture. Tony Hales, the CEO, recognized the need for dramatic change inside the organization and appreciated Paul’s talent and fresh perspective. He therefore allowed Paul to quit his marketing job, report directly to the CEO, and found a nine-person learning and training department that ran programs to help participants shake off stodgy thinking and boost their creativity. Yet despite the department’s blessing from on high and a two-year record of success, some managers thought of it as fluff. In fact, when David, a senior executive from the internal audit department, was asked to review cases of unnecessary expense, he called Paul on the carpet.

Paul’s strategy was to treat David not as a threat but as an equal, even a friend. Instead of being defensive during the meeting, Paul used the opportunity to sell his program. He explained that the trainers worked first with individuals to help unearth their personal values, then worked with them in teams to develop new sets of group values that they all believed in. Next, the trainers aligned these personal and departmental values with those of the company as a whole. “You wouldn’t believe the changes, David,” he said, enthusiastically. “People come out of these workshops feeling so much more excited about their work. They find more meaning and purpose in it, and as a consequence are happier and much more productive. They call in sick less often, they come to work earlier in the morning, and the ideas they produce are much stronger.” Once David understood the value of Paul’s program, the two began to talk about holding the training program in the internal audit department itself.
Paul’s refusal to be frightened by the system, his belief in the importance of his work, his search for creative and collaborative solutions, his lack of defensiveness with an adversary, and his ability to connect with the auditor paved the way for further change at Allied Domecq. Eventually, the working relationship the two men had formed allowed the internal audit department to transform its image as a policing unit into something more positive. The new Audit Services department came to be known as a partner, rather than an enforcer, in the organization as a whole. And as head of the newly renamed department, David became a strong supporter of Paul’s work.

Tempered radicals understand that people who represent the majority perspective can be important allies in more subtle ways as well. In navigating the course between their desire to undo the status quo and the organizational requirements to uphold it, tempered radicals benefit from the advice of insiders who know just how hard to push. When a feminist who wants to change the way her company treats women befriends a conservative Republican man, she knows he can warn her of political minefields. When a Latino manager wants his company to put a Spanish-language version of a manual up on the company’s intranet, he knows that the white, monolingual executive who runs operations may turn out to be an excellent advocate.

Of course, tempered radicals know that not everyone is an ally, but they also know it’s pointless to see those who represent the status quo as enemies. The senior women found fault with an inequitable evaluation system, not with their male colleagues. Paul won David’s help by giving him the benefit of the doubt from the very beginning of their relationship. Indeed, tempered radicals constantly consider all possible courses of action: “Under what conditions, for what issues, and in what circumstances does it make sense to join forces with others?”; “How can I best use this alliance to support my efforts?”

Clearly, there is no one right way to effect change. What works for one individual under one set of circumstances may not work for others under different conditions. The examples above illustrate how tempered radicals use a spectrum of quiet approaches to change their organizations. Some actions are small, private, and muted; some are larger and more public. Their influence spreads as they recruit others and spawn conversations. Top managers can learn a lot from these people about the mechanics of evolutionary change.

Tempered radicals bear no banners; they sound no trumpets. Their ends are sweeping, but their means are mundane.

Tempered radicals bear no banners; they sound no trumpets. Their ends are sweeping, but their means are mundane. They are firm in their commitments, yet flexible in the ways they fulfill them. Their actions may be small but can spread like a virus. They yearn for rapid change but trust in patience. They often work individually yet pull people together. Instead of stridently pressing their agendas, they start conversations. Rather than battling powerful foes, they seek powerful friends. And in the face of setbacks, they keep going. To do all this, tempered radicals understand revolutionary change for what it is—a phenomenon that can occur suddenly but more often than not requires time, commitment, and the patience to endure.

1. With the exception of those in the VA hospital and Allied Domecq cases, all the names used through this article are fictitious.
Sidebar 1: How the Research Was Done

This article is based on a multipart research effort that I began in 1986 with Maureen Scully, a professor of management at the Center for Gender in Organizations at Simmons Graduate School of Management in Boston. We had observed a number of people in our own occupation—academia—who, for various reasons, felt at odds with the prevailing culture of their institutions. Initially, we set out to understand how these individuals sustained their sense of self amid pressure to conform and how they managed to uphold their values without jeopardizing their careers. Eventually, this research broadened to include interviews with individuals in a variety of organizations and occupations: business people, doctors, nurses, lawyers, architects, administrators, and engineers at various levels of seniority in their organizations.

Since 1986, I have observed and interviewed dozens of tempered radicals in many occupations and conducted focused research with 236 men and women, ranging from mid-level professionals to CEOs. The sample was diverse, including people of different races, nationalities, ages, religions, and sexual orientations, and people who hold a wide range of values and change agendas. Most of these people worked in one of three publicly traded corporations—a financial services organization, a high-growth computer components corporation, and a company that makes and sells consumer products. In this portion of the research, I set out to learn more about the challenges tempered radicals face and discover their strategies for surviving, thriving, and fomenting change. The sum of this research resulted in the spectrum of strategies described in this article.

Sidebar 2: Tempered Radicals as Everyday Leaders

In the course of their daily actions and interactions, tempered radicals teach important lessons and inspire change. In so doing, they exercise a form of leadership within organizations that is less visible than traditional forms—but just as important.

The trick for organizations is to locate and nurture this subtle form of leadership. Consider how Barry Coswell, a conservative, yet open-minded lawyer who headed up the securities division of a large, distinguished financial services firm, identified, protected, and promoted a tempered radical within his organization. Dana, a left-of-center, first-year attorney, came to his office on her first day of work after having been fingerprinted—a standard practice in the securities industry. The procedure had made Dana nervous: What would happen when her new employer discovered that she had done jail time for participating in a 1960s-era civil rights protest? Dana quickly understood that her only hope of survival was to be honest about her background and principles. Despite the difference in their political proclivities, she decided to give Barry the benefit of the doubt. She marched into his office and confessed to having gone to jail for sitting in front of a bus.

“I appreciate your honesty,” Barry laughed, “but unless you’ve broken a securities law, you’re probably okay.” In return for her small confidence, Barry shared stories of his own about growing up in a poor county and about his life in the military. The story swapping allowed them to put aside ideological disagreements and to develop a deep respect for each other. Barry sensed a budding leader in Dana. Here was a woman who operated on the strength of her convictions and was honest about it but was capable of discussing her beliefs without self-righteousness. She didn’t pound tables. She was a good conversationalist. She listened attentively. And she was able to elicit surprising confessions from him.

Barry began to accord Dana a level of protection, and he encouraged her to speak her mind, take risks, and most important, challenge his assumptions. In one instance, Dana spoke up to
defend a female junior lawyer who was being evaluated harshly and, Dana believed, inequitably. Dana observed that different standards were being applied to male and female lawyers, but her colleagues dismissed her “liberal” concerns. Barry cast a glance at Dana, then said to the staff, “Let’s look at this and see if we are being too quick to judge.” After the meeting, Barry and Dana held a conversation about double standards and the pervasiveness of bias. In time, Barry initiated a policy to seek out minority legal counsel, both in-house and at outside legal firms. And Dana became a senior vice president.

In Barry’s ability to recognize, mentor, and promote Dana there is a key lesson for executives who are anxious to foster leadership in their organizations. It suggests that leadership development may not rest with expensive external programs or even with the best intentions of the human resources department. Rather it may rest with the open-minded recognition that those who appear to rock the boat may turn out to be the most effective of captains.

Sidebar 3: A Spectrum of Tempered Change Strategies

The tempered radical’s spectrum of strategies is anchored on the left by disruptive self-expression: subtle acts of private, individual style. A slightly more public form of expression, verbal jujitsu, turns the opposition’s negative expression or behavior into opportunities for change. Further along the spectrum, the tempered radical uses variable-term opportunism to recognize and act on short- and long-term chances to motivate others. And through strategic alliance building, the individual works directly with others to bring about more extensive change. The more conversations an individual’s action inspires and the more people it engages, the stronger the impetus toward change becomes.

In reality, people don’t apply the strategies in the spectrum sequentially or even necessarily separately. Rather, these tools blur and overlap. Tempered radicals remain flexible in their approach, “heating up” or “cooling off” each as conditions warrant.

Source: https://hbr.org/2001/10/radical-change-the-quiet-way
Regrets of the Dying

For many years I worked in palliative care. My patients were those who had gone home to die. Some incredibly special times were shared. I was with them for the last three to twelve weeks of their lives.

People grow a lot when they are faced with their own mortality. I learnt never to underestimate someone’s capacity for growth. Some changes were phenomenal. Each experienced a variety of emotions, as expected, denial, fear, anger, remorse, more denial and eventually acceptance. Every single patient found their peace before they departed though, every one of them.

When questioned about any regrets they had or anything they would do differently, common themes surfaced again and again. Here are the most common five:

1. I wish I’d had the courage to live a life true to myself, not the life others expected of me.

This was the most common regret of all. When people realise that their life is almost over and look back clearly on it, it is easy to see how many dreams have gone unfulfilled. Most people
had not honoured even a half of their dreams and had to die knowing that it was due to choices they had made, or not made.

It is very important to try and honour at least some of your dreams along the way. From the moment that you lose your health, it is too late. Health brings a freedom very few realise, until they no longer have it.

2. I wish I hadn’t worked so hard.

This came from every male patient that I nursed. They missed their children’s youth and their partner’s companionship. Women also spoke of this regret. But as most were from an older generation, many of the female patients had not been breadwinners. All of the men I nursed deeply regretted spending so much of their lives on the treadmill of a work existence.

By simplifying your lifestyle and making conscious choices along the way, it is possible to not need the income that you think you do. And by creating more space in your life, you become happier and more open to new opportunities, ones more suited to your new lifestyle.

3. I wish I’d had the courage to express my feelings.

Many people suppressed their feelings in order to keep peace with others. As a result, they settled for a mediocre existence and never became who they were truly capable of becoming. Many developed illnesses relating to the bitterness and resentment they carried as a result.

We cannot control the reactions of others. However, although people may initially react when you change the way you are by speaking honestly, in the end it raises the relationship to a whole new and healthier level. Either that or it releases the unhealthy relationship from your life. Either way, you win.

4. I wish I had stayed in touch with my friends.

Often they would not truly realise the full benefits of old friends until their dying weeks and it was not always possible to track them down. Many had become so caught up in their own lives that they had let golden friendships slip by over the years. There were many deep regrets about not giving friendships the time and effort that they deserved. Everyone misses their friends when they are dying.

It is common for anyone in a busy lifestyle to let friendships slip. But when you are faced with your approaching death, the physical details of life fall away. People do want to get their financial affairs in order if possible. But it is not money or status that holds the true importance for them. They want to get things in order more for the benefit of those they love. Usually though, they are too ill and weary to ever manage this task. It all comes down to love and relationships in the end. That is all that remains in the final weeks, love and relationships.

5. I wish that I had let myself be happier.

This is a surprisingly common one. Many did not realise until the end that happiness is a choice. They had stayed stuck in old patterns and habits. The so-called ‘comfort’ of familiarity overflowed into their emotions, as well as their physical lives. Fear of change had them
pretending to others, and to their selves, that they were content. When deep within, they longed to laugh properly and have silliness in their life again.

When you are on your deathbed, what others think of you is a long way from your mind. How wonderful to be able to let go and smile again, long before you are dying.

Life is a choice. It is YOUR life. Choose consciously, choose wisely, choose honestly. Choose happiness.

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To hear the stories that inspired this article and understand the full impact of regrets, read Bronnie’s book The Top Five Regrets of the Dying – A Life Transformed by the Dearly Departing. It is a memoir of her own life and how it was transformed through the regrets of the dying people she cared for. Join more than a million people who have read it so far and feel your own life transform. It is available in 32 languages.

Source: https://bronnieware.com/blog/regrets-of-the-dying/
Today marks one year since my brain surgery @PennMedicine to remove a brain tumor.

Today I am humbled to be able to say I am completely healthy and can physically live my life as though it never happened. But I can't lead my life like it never did. I have learned so much.

I was 36 years old when I was diagnosed. By the time I got to this day, when they drew the sharpie line to show where to cut, I had spend weeks planning what life would look like for my loved ones — my then 2-year-old son — without me in it.
It’s not an experience I would wish on anyone. But I have to tell you — I am so grateful now to understand the things I was forced to grapple with because of the tumor growing in my head.

Most people aren’t forced to grapple with the real possibility they’ll be gone when they are still otherwise young and healthy — when they still have most of their expected lives left to live. And so most people don’t have the chance to “change” how they live.

There’s a huge difference between intellectually *knowing* your life is fragile and could change in an instant — and actually facing it, sitting with it, and deeply understanding, through that experience, what it is that actually matters to you. Because if you deeply *know* you might not wake up tomorrow, or you might learn you have very little time left on this earth, the clarity is sudden, all consuming, and life changing.

I did wake up from my surgery, and a few days later I learned I was one of the lucky ones: the tumor was benign and the surgery was most likely the hardest part of my journey. Most brain tumor patients are not so lucky, as I knew going in and have learned further since.

(I’ve been asked to do advocacy work for brain tumors and brain cancer, and I always feel I have to explain I didn’t go through what others did — only to be told, well, there are so few brain tumor survivors, we need your voice. 💔).

The things I learned that my heart can no longer forget are the things so many of us know but often fail to act on in a focused, daily way: The people we love and the health of our bodies matters more than anything else ever can or will.

Showing up for them and for ourselves is what will give us the kind of joy we are seeking in so many other, and ultimately misguided, places. Our health includes meaningful work — whether it’s the work itself or the act of working to sustain the people that you love.
But work for the sake of vanity, or the approval of others, or the pursuit of money beyond security—no. Our society may reward those things. Certainly my industry does. But this is not what will matter to you when you are staring death in the face.

No. What will matter are the people you will no longer be able to know or matter to. I thought about my son’s future graduation, yes. But I also thought about not being there when he comes home from school upset over being bullied, or proud of getting an A.

I thought about not being able to give my son a sibling. I thought of my husband having to be a parent on his own, having to start over, of not being able to show up for him when he has a bad day at work or loses a parent or a friend. I thought about my parents losing a child.

And it’s those things — showing up, every day, in big but mostly in small ways — for the people I love — that I too often sacrificed in my life without even truly grappling with or understanding what I was giving up.

I don’t live my life that way anymore. I refuse to. And I am just so grateful to God and to everyone in my life who carried me through this trial and brought me to this changed place.

I am a better person for it. I am a better journalist for it. My empathy for people facing health challenges, chronic pain and illness, aging — it’s expanded in ways I never could have understood.

I can never thank enough the family, friends, and doctors who brought me through this. I owe them all a debt of gratitude that I will carry with me always.

(below with @DanielYoshor)
I would never wish what I went through on anyone. But I’m sharing this today in hopes that maybe someone out there will see it and maybe it will change how they see the world just a little bit. That they can learn something without having to face anything like this.

I wish I had lived this way every day without having to go through this. But I am so grateful to be here, now, with most of my life still ahead of me, understanding something most people don’t have the chance to see until it is too late.

Kasie Sue Hunt is an American political correspondent for CNN.

Source: https://threadreaderapp.com/thread/1577350093287702537.html