EXECUTIVE PRESENCE: BEHAVING AND PERFORMING AS A LEADER

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Julie Jansen and Sarah N. Samuels, CFA, discuss the fundamental elements of leadership. Jansen identifies some familiar leadership competencies, but there are several competencies that leaders need to pay close attention to and constantly develop, such as projecting confidence, cultivating a professional image, and communicating effectively.

JULIE JANSEN: So, I am talking to you about what is coined in the world as executive presence. And it doesn’t mean that you have to be an executive to have executive presence. Right now I’m doing, as Sarah mentioned, executive coaching in a number of companies. I work across industries. So, I don’t just specialize in financial services, and I’ve been privileged to do some work for various CFA societies across the country on occasion. But I also do work in nonprofits and pharma and consumer products and health and a lot of other industries.

Right now, I’m coaching about seven people at different companies, or maybe seven or eight, I would say. And they’re ranging in the ages of between 31 and 56. And they’re actually split pretty
evenly between genders. So, to give you some context, I did very intensive 360-structured interviews on all of these people, and they’re all immensely respected by their employers, and they are talented, they’re smart, they contribute just like all of you.

Let me give you a description of a few of them. So Jodi. Jodi is the senior director of supply chain for a pharmaceutical company that was acquired last year by a larger pharma company. She manages a team of 20 people. Her style tends to be all business — direct, brusque, no small talk. She’s really smart. She’s really knowledgeable about supply chain.

Unfortunately, the acquiring company’s culture is collaborative, indecisive, even, unfortunately, also passive aggressive. So, in six months, Jodi has ruffled a lot of feathers and is now trying to do damage control. Now you might think well, she’s brusque, she’s direct; it’s because she’s a woman that people are not accepting her style. That actually isn’t true in her case. What she hadn’t done is she hadn’t assessed the culture of the new, acquiring company.

So, then we have Lynn. Lynn is a managing director at a large network of advertising agencies. She doesn’t trust junior people too easily. And when Lynn presents to groups, while she’s a skilled, competent presenter, she doesn’t read the audience, and she doesn’t come across as a listener. She also, unfortunately, is characterized as lacking empathy.

Eric is the head of development for a well-known nonprofit in New York City. I just finished Eric’s 360, and according to his colleagues Eric has frequent, not my words, meltdowns. He stomps out of meetings, he blames his team when things go wrong, he micromanages, and he has a team of 50 people. Each of these sponsoring employers want these individuals to demonstrate more executive presence and, as a result, be well respected throughout the organization and move to the next level.

How many of you have worked with an executive coach, with a show of hands? So I’d say it’s a smattering of you. Probably, it looks like about 10 of you. I define executive presence as this: displaying a consistent view of yourself as a compelling force inside your firm or organization and in your industry. So the key words there are consistent, view, compelling force. That’s executive presence.

So, whether you work as a senior contributor, you supervise a few people, you work closely with clients, you manage a large team, there are going to be specific expectations that people have of you. And when these expectations are not met, it is nearly impossible to turn around someone’s negative impression or assuage their disappointment.

You are all so impressive. I’ve been fortunate to be here since last night, and I’ve talked to a number of you. You’re smart, you’re talented, you’re accomplished, you’re ambitious, and it honestly seems a little bit strange to me to stand up here and talk to you about some of these things that seem to be basic, practical, logical, obvious. However, my experience is that developing and exhibiting
executive presence doesn’t just come from experience and technical knowledge and education. It also comes from common sense, from intuition, and self-awareness.

So, how many times have you heard someone say, she’s really intelligent, but she just doesn’t have any common sense? Who has a family member like that? Yes. A few of you. A few years ago, I coached someone at Nickelodeon, and her manager called me frantically and said, “Julie, you need to talk to Karen.” And I said, “what’s up? What happened with Karen?”

Well, Karen was called to an impromptu meeting with the president of Nickelodeon at the time, and she brought her lunch. Now, Karen brought her lunch. The president didn’t bring her lunch. So does anybody get what was askew about that? That seems so commonsense. When I asked Karen, “why did you bring your lunch to the meeting with the president?” She said, “it was noon, and I was hungry.”

Yes. Being good at your job is not all that matters. It is important. It is important to be competent. There’s a woman who you may be familiar with named Sylvia Ann Hewlett. She’s a prolific author. She studied the elements of executive presence, and she found that gravitas — how you act, and your confidence in your own abilities and knowledge — is even more important than communication or appearance.

I can’t stand up here and tell you that I guarantee that if you do all the things that we discuss in the next 40 minutes you will not have problems in your career, that you won’t, maybe, be fired, you won’t be promoted, any of that. But what’s tough about these, and Sarah and I were talking about this just a few minutes ago, what’s tough about these things that we’re discussing is they are the areas that most people derail in at work. That’s where they lose respect. It’s where they might even damage their reputation or their relationships and even potentially get fired.

So, the people that master these things that we’re talking about tend to be well liked and respected and successful overall. So, bottom line, executive presence is the ability to win the confidence of those around you. It’s when you actually possess a professional magnetism that influences others, that you’re admired for, and when you have executive presence, people rely on your strength and your wisdom.

So, what I’d like to talk about first, and this is sort of three buckets today, these are what I call my 11 keys, and 11 is really a lot. It’s a long list, so I’m going to just focus on two, the first one and the eleventh one and whip through the other ones. And I will start talking faster and faster and faster, probably not as fast as the gentleman who was talking about teams and talking about mathematical equations. I mean, I said to my table, my goodness. I thought I talked fast. I need to speed it up compared to him.
So, when I talk about 11 keys, these are so easy to understand. You can look at them right here on the slide and know exactly what they mean. They are the foundation in my work for relationships and for success at work.

And when I’m interviewed by the media, I’m frequently asked, well, Julie, what are the 11 keys that are the most important? And I say, well, to myself, well, silly, if I thought there were more that were important, I wouldn’t have 11. But the truth is there are two that are more significant. So, let me just whip through the others.

*Confidence.* Both men and women lack this at times. In a few minutes, I’ll talk about confidence in greater detail.

*Curiosity* is simply defined as a need or a thirst or a desire for knowledge. And by the way, when I’m going through these keys, I would implore you to look at yourselves, think about yourselves, and think about which ones are great strengths, which ones are areas that you might be able to develop, and also which ones you overuse.

So, for example, I overuse decisiveness. I always think I know what the answer is. I can solve the problem, boom, boom, boom. I have a staccato style. And I’m over using it and leaving other people out in the decision making. So, curiosity is motivating yourself.

And it was funny because the woman that just spoke earlier, help me with her name. Yeah, Lucy, who is hysterical, Lucy. Oh, my gosh, I’m going to read her column. She said fear, and fear does motivate you. It does, and I’ve been motivated myself by fear in my career. Also what can motivate you is boredom, discomfort, pain, change, an idea, a challenge, any value that’s threatened. All of those things can motivate you to be curious and inquisitive and want to explore and actually activate your behavior to raise your awareness and create opportunities and solve problems.

*Decisiveness.* To quote an older president, as in not alive, Theodore Roosevelt said, “In a moment of decision, the best thing you can do is the right thing, the worst thing you can do is nothing.” And in today’s world, the ability to make pretty rapid decisions is essential. The ideal decision-making process involves a combination of data (your favorite thing), comparing the pros and cons, and listening to your instincts.

*Empathy.* The core of working with people is helping and understanding them. When I talk to people and say, well, what do you want to do next in your career? What’s the next role for you? Often they’ll say, well, the one thing I want to do is avoid politics. And I’ll say, OK. Good. Then go stand in a closet. There are politics in every part of our lives, and the best thing you can do in dealing with challenging behavior and politics is be empathetic toward other people’s agendas, their personal and their professional agendas.
Flexibility. Change makes people anxious because it could represent a loss of control. You could be living with uncertainty and ambiguity. You could be enduring a certain level of discomfort. And since we can’t always predict what the outcome of a change is going to be, we sometimes automatically fast forward to thinking there’s going to be a penalty, not a payoff.

And by the way, I think flexibility, while I can’t prove it empirically, I would say that people do tend to be born more one way or another. Is there anyone here who would admit to not being as flexible as they’d like? Yes. We have one brave person in the front row. Very good.

Humor. Who here does not like to laugh? You’re not going to raise your hand. You wouldn’t be popular. Someone who doesn’t have a sense of humor is challenging to deal with. When I was doing one of the 360s I mentioned a few minutes ago, one of the questions I ask is, “does Sarah have a sense of humor? Does she exhibit humor?”

And this guy said to me, “I don’t know because I don’t have one.” And I have to say that was a first. I had never heard that before. Humor, though, is highly personal; it’s individual, it’s subjective. So, here who here finds Amy Schumer to be funny? OK. How about Chris Rock? OK. How about Melissa McCarthy?

So, some people didn’t even raise their hands. So, regardless of the brand of humor that appeals to you, humor is a wonderful thing. It can diffuse negative emotions, it sparks enthusiasm, and it’s inspiring.

Intelligence. So my intelligence key, which is the next slide, is not IQ. Intelligence, for me, is six things: your ability to solve problems, being creative, possessing a larger perspective. So, the more senior you become, the greater the expectation is that you make decisions and take action more strategically. And you all have to do that in your various roles anyway. You have to be analytical, and you have to be strategic.

Managing your time effectively, which, you might imagine, a lot of people struggle with. And when you’re struggling with it, everybody else around you is struggling with it as well.

Communicating effectively, which we’ll talk about in a moment.

And then finally, executing. How well do you carry out things and make them happen?

Optimism. The definition of optimism: You hear that cliché, the glass is half full. I think the definition of optimism is your ability to handle adversity positively. If you can do that — it’s easy to be optimistic when you’ve got, let’s say a six-month sabbatical plan, your kids are all healthy, you’ve got all the money you need in the bank, you just bought a new car, you just bought a Prada
item for your closet, and everything is wonderful. It’s easy then. It’s not easy when things aren’t wonderful, and that’s where you really show your stuff as far as being optimistic.

Perseverance. So many of you are charter holders here. It’s impressive. That is one tough thing to accomplish. And so I have no doubt that everybody here possesses perseverance.

Respect is one of my favorite things to talk about. So for some reason, we are living in a world of incivility.

So one of my favorite older stories is I used to be in sales, and I would go to a Monday morning staff meeting in New York City. And there was a guy, who at the time I thought was older, named Jim. And Jim, every Monday morning in the staff meeting, would cut his fingernails. Yes. And they would go flying, and while Starbucks has been in business since 1971, this was in the 90s, I guess. And so, we didn’t have covers and lids on our coffee cups. We used the ceramic ones. Yeah, so everybody would go, ah, there’s Jim’s nails. And he, by the way, was a lovely guy, good at what he did.

It could be something as little as that, and by the way, it’s usually the little things, or it could be something very large. But respect, the sad truth is, that it’s been on the downslide for a while. People cutting in lines, road rage, the use of smartphones in inappropriate places. I just took Amtrak up here. Believe me, I could recount about six conversations I shouldn’t have heard.

So, self-awareness. So this is where I’m going to dig in a little bit. So undoubtedly most of you believe you know yourselves well. I don’t have the polling device, but if I were to ask you for a show of hands, what percentage of accuracy do you think you have about yourself, who you are, how you come across, your strengths, your areas for development? So, let’s say we start at 10% or we go all the way up to 100%, what’s your guess, if someone doesn’t mind just speaking up?

OK. We hear 75. Do we hear 60? Do we hear 50? Do we hear 40? I told you, auctioneer. So it’s usually somewhere around 35 to 60 for most people.

I like to joke and say I’ve lived in Boston, but it’s been a while. So, I live near New York. So, in New York, everybody goes to therapy, and by the way, we have a lifetime plan for therapy. So, “who’s your therapist?” is next to “what do you do for work?” as the second question that everybody asks.

When I go to the Midwest — which is where I am originally from, Cleveland, Ohio — we don’t talk about therapy. When I mention therapy, everybody looks down. But the truth is, unless you’ve gone through therapy or sadly you’ve had a very traumatic event occur to you….

So, I work with a foundation I have to plug, Cancer and Careers — the only foundation in the world that helps people with work issues who have had cancer. And most of them have gone
through an epiphany and said I don’t want to do this anymore, what I’ve been doing. I want to do something different.

So those are the two categories of people that tend to be very self-aware, otherwise, unless you’re just naturally a self-aware person and you’re consistently going out and asking for feedback, and I’ll share the other two ways that you can develop self-awareness; you might not be as self-aware as you even may think.

So, why don’t we tend to ask for feedback? Do you think I really want to know how you felt about my presentation when I’m done? No, don’t tell me. Because someone’s going to say something that I might not like — and I’m kidding.

Of course, I want to know. I always want to improve. But we don’t ask for feedback because we don’t necessarily want to hear what we’re going to hear. That is the most obvious way to work on developing your self-awareness.

And then there’s the physical world. So, there’s mirrors, cameras, recordings, reality television. You’re a highly sophisticated, intelligent group. So I have a feeling what I’m going to see here, but how many of you watch reality television? OK. So the rest of you are lying. Yeah.

So, the reason that I watch reality television, one reason or another than pure, unadulterated, wonderful pleasure, is that it’s a way for you to have role models. So, when I’m watching “The Bachelor,” which my husband absolutely hates, and he says, why do you watch that stupid show? And I say, well, I always think what would I do if I were in a house with 22 gorgeous, hot guys. And he looks at me.

So, all of those forms of media give you perspective that you might not have because you inadvertently will compare yourself. And then the third way to develop self-awareness is actually yourself, a mantra, imagery, meditation, elevated mental and physical awareness. Physiologically, I’m a fair-skinned person. I was a redhead when I was a kid. I’m, sorry, a fake blonde right now.

And I can feel my face warming up. And I can feel just physiologically what’s happening with me, whether it’s anxiety or whether it’s impatience or whatever it is. And so I have developed a mantra that I will not share with you, and I will not tweet it out, of what I say to myself when I know that I need to control myself and whatever I’m feeling.

I once worked with a guy. He was probably about 42. He worked at one of the big ratings companies in New York. I won’t name the ratings company. And lovely guy, and out of his feedback, they said, there’s one thing that’s weird about Jim. And I said, yeah, what is it?
And they said, well, when he sits in meetings, he rests his arm on top of his head. And I said, really? Wow. And then about eight people said the same thing. And so I said, well, I guess I have to talk to Jim about this, and he saw it in writing.

And I said Jim there's one thing I just want to talk to you about. What is this? He goes, what are you talking about? I said, you sit with your arm rested on your head. And he sat and he looked at me for about 20 seconds, and he said, “Oh. My whole family does that. Didn’t even realize.”

So, let’s go to your presentation. And now I’m reverting back to key one, confidence. And confidence is very interesting, and this is where I’m going to share some research with you.

Confident people exude positive energy and draw other people to them like a magnet. They tend to be optimistic. They tend to be risk takers. They tend to do better with pressure. They tend to tolerate frustration. They usually seem to be calm and relaxed and comfortable in their own skin.

Katty Kay and Claire Shipman wrote a book in 2014. Great book. Anybody read it? The Confidence Code. Love that book. And it is research and anecdotally based. And they concluded a number of interesting things. Women, they say, generally think that if we keep our heads down, we play by the rules, we work hard, our talents will be recognized and rewarded.

In the US, as you know, women earn more college and graduate degrees than men do. We make up half the workforce, and we are closing the gap in middle management. These are statistics you’ve heard over and over again at this conference.

In over a half a dozen global studies, it was found that companies who employ larger numbers of women outperform their competitors. So, I’m not going to go through these statistics ad nauseum, again, because you’ve heard it over and over again.

But what I do think is interesting…. By the way, I was in a female AVP’s office in New York last week. And I said, tell me about your career. And she said, well, I’ve been promoted a lot, and I never really was qualified for any of the jobs. And I said, really. You didn’t just say that. I never want to hear those words come out of your mouth again. I don’t ever want to hear you or see you think that again.

But success correlates just as closely with confidence as it does with competence. So, men initiate salary negotiations four times as often as women, and when women do negotiate, they ask for 30% less money than men do. And let me be clear in saying men doubt themselves just as much, but not with the exacting, repetitive zeal, and they don’t let their doubts stop them as women tend to do.

So, if anything, men can tilt a bit toward overconfidence. They’re not trying to consciously fool anyone. There is a professor at Columbia Business School named Ernesto Reuben who has coined
the term “honest overconfidence.” And he says that men generally believe they’re good and the self-belief is what comes across. What also helps is the testosterone — I always have trouble with that word — helps fuel this because with 10 times more testosterone pumping through their bodies, this affects speed, strength, muscle size, and competitive instinct.

On the other hand, more women suffer from perfectionism — I’m one — which inhibits risk taking, because perfectionism causes you to wait until you are perfectly ready and perfectly qualified. Women also assume the blame when things go wrong. I don’t remember my husband ever assuming blame for anything even when it was clear. Like the time he hit the garbage can and said, “oh, did you see that?” I said, “yeah, you’re the one who was driving the car.” That seemed to be pretty factual to me.

So, confidence is the stuff that turns thoughts into action. When women don’t act, when we hesitate because we aren’t sure, we’re holding ourselves back. But when we do act, even if it’s because we’re forced to, we perform just as well as, maybe even better than, men do.

So, how do you improve your confidence? It’s an unshakable belief in yourself based on reality. It has to be based on reality. Confidence under pressure is, as Sylvia Ann Hewlett said, viewed as a core aspect of gravitas, and I already talked about all the things that confident people are.

So, what do you do? These are some simple tips. I’m not going to go through them all. But do take a risk. Learn something new. Write down your strengths. The best thing you can do is continually, regularly, update your resume in your LinkedIn profile and write a bio and follow companies and do all that career stuff that most people wait to do until they’re miserable or there’s an emergency.

So, if you do all those things, you’ll be consistently reminding yourself of all the things that you should be confident about. And write down your achievements on a regular basis.

All right. So let’s segue to communication. Who agrees, communication is essentially the foundation for most things? Is it not? There are so many different types of communication. And research has shown over and over again the connection between strong communication skills and problems, whatever they are. The way you communicate actually is reflective of how intelligent people think you are, even if you’re shy or introverted and you’re not as comfortable at presenting. I was nervous before I got up here. We all get nervous on a certain level. People do judge you based on your listening skills, your presentation skills, the way you write your emails, all of those things. And so I want to just share with you five communication skills.

And by the way, the two-way process is like that telephone thing that you may have played when you were young. If I whisper in Laura’s ear here in the front and it goes all the way around, then it’s going to end up being dramatically different at the end. So, there’s a lot of checkpoints you have to put in your communication to make sure people understand you.
So these are the five communication skills that I think are very important. And by the way, with all these communication skills, it’s imperative to use sensitivity. And one way to learn to use sensitivity is to ask yourself, how would I respond in that situation? What would be the best way for me to be told that?

*Self-disclosure* is sharing, not TMI sharing, but sharing with the other person what you think, what you want, what you feel. We too often communicate and forget that step, and it makes you look human, and it also helps put what you’re asking or telling in context. So, that means acknowledging ownership of your statements; making sense statements like what you heard, what you saw, what you smelled, what you felt; using intention statements, I wish, I want, I would like, that sort of harder hitting communication; and then making action statements, informing the person what you did and what you’re going to do.

*Assertiveness.* Well, people get assertiveness and aggressiveness mixed up a lot. I don’t know. My opinion of assertiveness is defined as standing up for your opinions, your ideas, your beliefs, and your needs while respecting others. That’s what it is. So, you’re always respecting others, but you’re standing up for yourself.

And by the way, this includes self promotion. How many of you love promoting yourselves? Nobody? Come on. OK, a man in the back. Yay. Another man in the right. Actually, I’m pretty good at promoting myself, and I figured out how to do it. And it’s all about the tone, the achievement, looping in other people so you’re not just giving credit to yourself, and being really excited about what a difference you’ve made.

So, if I said to you, I wrote this fabulous book, *I Don’t Know What I Want, But I Know It’s Not This*, and the third edition came out this year, and what I love about it is I get emails from people all over the world saying, “oh, your book helped me. I didn’t know what I wanted to do.” That’s not saying,” oh, I’m an amazing author, aren’t I fabulous?” It’s saying “I did something that helps people; how fortunate am I?” Something like that.

But assertiveness is all about your language, your body language, your appropriate facial expressions. I did coach someone once who used to walk like this, and this was in her 360. It’s amazing what people tell you in a 360. She walked like this down the hall and was really aggressive. And people were like, it didn’t matter what her gender was. They didn’t want anybody walking at them like that.

*Active listening and acknowledging.* This is hearing what the person really says. Has anybody here ever taken a listening course? No, because they don’t exist. But yet you spend more time listening than you do breathing almost. Almost.
Who in your life thinks you're the best listener? Who do you think that person is? Not your husband. Your friends. Your friends. You tend to listen more to your friends. Who also thinks you're a pretty good listener? The person you report to, even if you're faking it because, you're — you know.

But the truth is we do listen a lot, so become aware of your own personal filters, hearing only what you want to hear, being able to paraphrase. Paraphrasing and acknowledging are two of the easiest, simplest, best communication skills out there. And using appropriate nonverbal cues, taking notes, learning to want to listen. In leadership studies, listening has actually been identified as the strongest compensator skill that can be used.

So, a compensator skill is, “Julie Jansen is really directed and a little bit abrupt in her communication, but she's a great listener.” So, it compensates for something that might not be as appealing a quality for people. And it's also what's called the “saving grace” skill. Saving grace skill is humor, compassion, approachability, those kinds of things.

Learn how to ask different questions. There's not just open ended and close ended; there’s thought provoking and multi-part and comprehensive and there’s clarifying, fact finding. There's so many different types of questions that you can learn to ask. And remember that the average person can listen at 500 words per minute, but can only speak about 125 words per minute.

**Constructive feedback.** So constructive feedback is code for criticism. Constructive feedback is important for you to become comfortable at giving and not just to your direct reports and your teams, but also to your peers and to people who are senior to you and to clients. It's very important. It really entails you remembering that it's to help someone.

It is not to criticize them. You just want to make sure the time and place is appropriate, that you're always protecting the person's self-esteem, and that you're thinking it through, you're scripting it out, you're making sure you're giving positive input, and you're giving specific examples. And those are all the components of giving constructive feedback.

When was the last time someone here gave constructive feedback — don't count your children — to another adult? Anybody? Recently? It's hard for people though.

And then finally, we talked a lot about teams today in the various sessions, and I found that fascinating information that Anita shared with us about building smarter teams and Scott, the fast talker, about reinforcing how effective teams are. And as Anita said, it's not just the team leader's accountability to be a good team communicator, and she didn't say it quite like that. But a good team communicator is someone who uses all the skills that are listed on the slide before team communication. So using self-disclosure, being assertive, being an active listener, being an acknowledger, and being able to give constructive feedback, but not in front of people.
Image. Image is a significant... there are different theories about whether it’s important. I happen to think that people can be a little bit judgmental, and so if you saw me at the conference and I reminded of your eighth grade teacher, and you didn’t like her, her name was Mrs. Crabapple, you’re not going to like me just because physically I might resemble that person until maybe you get to know me and talk to me. But generally speaking, it does take only about 15 seconds for someone to form some sort of impression about you visually. And with image, it’s also the little tiny things, like the nail clipping example that I gave you.

So, I’m going to give you another one. I have an acquaintance named Wendy, and Wendy wanted to network with me. So, we met at Starbucks, and she got one of those gigantic muffins that the crumbs all fall off of. And she placed it on the table, and I looked and there was no plate. And I’m like, ooh. And they’ve just disproved the five second rule as I understand it.

And so she proceeds to eat the muffin, and then she takes her finger and licks it and does this on the table. I’m not making this up, I swear. Yeah. And can I ever look at Wendy the same way? No.

But kidding aside, your image is composed of four elements — it would be helpful if I go through it — your physical presentation, your oral presentation, the content and organization style, and your ability to read yourself and others. That’s really image. And we tend to just kind of focus on body, clothing, hair — and yeah, those things are important, but your psychological presence is what influences many aspects of your image.

So, I have met with someone who’s actually... she wants to go into marketing in your business, and she was an analyst. And she went to Penn and she said, I love being an analyst, but I never really connected with analysts as much as I do on the sales side. And she said, but Julie, I just turned 50, and I’m overweight. And I said, I’m sorry that that bothers you, but so what does that have to do with? You went to a great school. You have great experience. You have a great career track. You’re an amazing person. And I’m not saying... this is not bullshit. She is.

So, in fact, she was so jealous that I got to hear Sally speak because she said I’ve always wanted to hear her speak. She was all excited. And she heard her on CNBC, by the way, this morning. But anyway, that said, image is something to consider, particularly the psychological aspects of it that drive the way you feel about all this stuff.

And then our final topic is understanding and respecting organizational culture. So, I feel strongly that someone who is a leader and possesses executive presence understands all the elements of organizational culture as listed here. So this is what makes up organizational culture — its values, its beliefs, its people's habits; it’s the way people, groups and individuals, interact with each other. And it’s usually the simple things — its history, its mythology. its everything.
Can someone walk in and changing the culture of an organization? Not too easily, even a CEO. It’s not easy to do. It’s entrenched, depending, of course, how long the company has been around. Has anybody here worked somewhere or worked somewhere now where you don’t quite fit into the culture? I mean, putting aside the male/female thing, which I imagine could color that, but yeah.

And you know what that feels like? Because I’ve only had one experience. I’m fortunate. I’ve been in business for 16 years on my own. The job I had before I started my business was actually up here in Boston. The company no longer exists, and I knew when I interviewed that I shouldn’t go work for the company, but there were specific skills I wanted to develop, so I did.

And I felt, every day for the year and a half I worked for that company, like I had a stone in my shoe. I was walking down the street with a stone in my shoe, and I couldn’t get the stone out. That’s how I felt when I didn’t fit into the culture. It’s painful. So that said, you have a culture that you’re working in and you’re not going to change it.

And by the way, I do have a funny cultural story, at least I think it’s funny. So I go to New York City like three days a week for clients, and one day I have this client who said, let’s meet at Lord & Taylor in New York City at the restaurant there. And I’ll meet you in the front of the store. And I guess it was opening hour. It was like 10 o’clock in the morning during the week.

And I walk in and it’s like rows of chairs, and they’re playing the national anthem, like these speakers playing the national anthem. And I don’t know why I started laughing. I don’t think the national anthem is funny. In fact, I’m very patriotic, but it struck me as so odd. And there are security guards, and they’re going “sit down, sit down” to everybody.

So we’re all sitting, we wait for the national anthem to be over, and then we all got up and went to whatever department we were going to go to. So I went up to the security guard and I said, “do you mind my asking why were you playing the national anthem?” He goes, “oh, we’ve done it for 60 years.” And I said, “but why?” He said, “that’s what we do.” And I said, “oh, OK.”

It’s kind of interesting. It’s not a football game, but very odd. But that’s our culture.

So, culture is a distinctive way of life. I’ve already referred to politics, and on the reference slide that you’ll see, you’ll see that I talk about a book called Political Savvy by a professor named Joel DeLuca. It’s an older book, but it’s a great book. And he says, “political savvy is the ability to ethically build critical mass in support of something you believe in. It can be an idea, a project, a process, or even your reputation.” And so, being politically savvy is very key to understanding or respecting your organizational culture.

So, here are some guidelines for paying attention to your culture.
Understand and follow the chain of command. That sounds so basic, doesn’t it? It sounds so 101. One of the most popular questions I get by the media is, “is it OK to go over your boss’s head?” What’s the answer? Unless he’s running after you with an axe, that’s the only time, and hopefully, that never happens.

So, bypassing the chain of command is never a good idea. I have a client, she was buddies with her boss’s boss, and she would confide in him all the time. And her boss was not happy about it, and it did not make for a good career for her.

Polish your selling skills. Those of you who interact more frequently with clients, people who are in business development and sales, they tend to be pretty good at playing politics because they use the same skills. They figure out who influences decisions, they figure out what constitutes a personal win for decision makers, and they are good at negotiation. Negotiation is a very powerful skill.

Communicate effectively. We’ve talked about that. It’s good politics to learn how to communicate the right information to the right people. I have a friend named Mike who worked in human resources, and he worked for a large marketing communications agency. And he got laid off, and his boss did the exit interview, and whatever transpired, I don’t know. And then she said to him, “you know, Mike, you never understood how to communicate with me.” And he said, “what do you mean?” She said, “I would send you emails, and you’d get up and stand in my door every time.” And she didn’t like that, and it stuck with her. And it influenced her that much that it might have been a factor in him losing his job, strange as it sounds.

But when I work with clients, I say, do you like texting? Do you like IMing? Do you like in-person? Do you like phone? Do you like nothing? What do you like? And I pay attention to that.

Choose your battles. Many political battles are petty and simply not worth your time and effort. If you see major players in your firm starting to line up on the negative side of a project you’re promoting, or something you really believe in, don’t be afraid to call it quits, and use your chips in another way and on another day.

Learn from the winners. The bad rap is that people think that people who play politics are those people who are sleeping their way to the top or doing something illegal. And yes, does that go on? Of course, it does. But we know that there are plenty of ethical people who succeed with the help and cooperation of others. So, learn by watching the success and failure of others and figure out why that’s happening on both ends.

Act with courage. Don’t be afraid to take risks and speak up. Just make sure you’ve done your homework, and you’re presenting whatever it is in a constructive and respectful way.
And then, do a stakeholder analysis. This is something, it’s called analysis, stakeholder mapping, that I encourage all my clients to do. Take a look at who in your work life influences your job in some way. Identify those people. Label them in a way that they’re either a champion, or they might be a little negative because they inherited you, or they might just be neutral (they have no experience with you.) And put a little strategy in place for developing and building relationships for each person. And remember that relationships are never static.

Be generous with your time and knowledge. For people, we talked a little bit about the queen bee syndrome today, and I’ve heard that over and over again, that there are many women who do not help other women. I have not had that unfortunate experience, thankfully, but I’ve heard it. And you need to be generous with everybody that crosses your path unless they’re out to get you. There’s enough to go around, in my opinion.

Be an organizational advocate. Even if it’s something you don’t quite agree with it, don’t bad mouth it. I mean, it’s the whole thing about social media where glass door is useful, but should you be badmouthing former employers or badmouthing anybody or writing bad reviews? I don’t know. I’m not so comfortable with that. And just be energetic and enthusiastic.

As Marg had said several times through the conference, this is the what, and this is the how. This is the goal of the conference. So right now, my guess is you’re all feeling like you need a complete overhaul, or you’re just simply overwhelmed. But what I would like to say is just choose one thing that we discussed very rapidly in this time together. Decide if it’s important enough to develop it or to change.

Think of someone who’s on your team whom you could help with something that we’ve talked about, whether it’s fitting into your organization’s culture, more effectively learning to use more assertive communication, whatever you do, make a commitment to change. I don’t care how old you are or how much experience you have. As human beings, you can always continue to learn and grow, and above all, have fun with it. Thank you.

SARAH N. SAMUELS, CFA: We’ve got some really good questions from the audience, so I’ll just start out with a few of those. This one, I think, is a really good one: “A lot of organizations that you work with are clearly forward thinking enough to see that they need a coach or to see that maybe there’s room for improvement. If we’re sitting in an organization that maybe doesn’t share that view or it’s never occurred to them, how should we approach that? Should we suggest it to the organization or wait until they come to us?”

JULIE JANSEN: Well, yeah, I think it’s far more beneficial to approach your organization and ask about coaching before there’s any kind of a problem or an issue. And just say it’s a developmental
investment that your organization can make in you. And it’s hot, hot, hot out there, executive coaching. You can’t believe how much is going on.

And so, it’s just positioning it, maybe finding out a little bit about the pricing of coaching, so you know what the investment is, being practical around that, and then just being able to outline the things that maybe your team or you would really like to focus on that will benefit the business and your organization, for sure.

SARAH N. SAMUELS, CFA: Right. Excellent. Your mantra technique sounds very interesting.

JULIE JANSEN: I’m not sharing.

SARAH N. SAMUELS, CFA: I know you won’t share. I’m curious. So I assume that what you’re saying to yourself is something positive.

JULIE JANSEN: Yes. Of course. It is not negative. I do not try to make myself feel bad about myself.

SARAH N. SAMUELS, CFA: So, how can you help us learn how to apply a mantra technique without spilling the secret sauce?

JULIE JANSEN: Yeah. Remember when I mentioned the guy, Eric, who has meltdowns? And I’m working with him on creating a mantra. So he said, I do feel when I’m starting to lose it, when I know that, “oh, no, I’m going to lose it and I can’t control it.” And composure, by the way, is one of the leadership competencies. It’s very difficult to develop continually because a lot of it is wiring. And so we’re in the process of creating a mantra for him that’s going to be language, that’s going to make him feel good about himself, that’s going to make him feel a little bit more composed, and that’s all it really is. It’s just experiment a little bit with that.

SARAH N. SAMUELS, CFA: Great. So, one of our audience members talks about empathy and suggested that sometimes it’s hard to understand what the motivations and agenda might be with the folks that you’re working with. So without that information or that instinct, how can one improve one’s empathy?

JULIE JANSEN: Ask. Ask. I sense, Sarah, that you’re feeling frustrated about this. I’d love to have a conversation with you, grab a cup of coffee, and see what we can do to talk about collaborating more effectively where there’s not frustration for you or whatever it is. And sometimes the issue is that people don’t always know — so that self-awareness point — they don’t always know what their agenda is. But just try to make an effort to show that you care.
SARAH N. SAMUELS, CFA: Great. You've talked about this, and it’s been a recurring theme, I think, throughout this conference, that many times, women believe that this industry is 100% a meritocracy and that if you just keep your head down and work hard and get your CFA and get your MBA and get your KIA, whatever the things that are your goals, that you’ll look up and see your next step. And I think it would be just really helpful to hear from you about where on the scale... how do technical skills compare to executive presence in terms of tipping the scales? And also depending on where you are in your career; I imagine that folks earlier in their career, maybe in their 20s, need to develop technical skills first.

JULIE JANSEN: They do. I mean, all those things that you listed are expected, your CFA, your MBA, working hard, doing a good job, being competent, showing up. Those are expected, and they’re important, and I’m not saying they’re not. But what become more and more important as you move along in your career are all the things that I talked about briefly today.

And is it fair? Maybe sometimes not, but it is how people learn to trust you, and it’s how they judge you, and it’s how they base decisions about you and your career. But you also want to take as much accountability for stepping up and asking for things and being assertive. And you don’t have to have a powerhouse personality to do that. You can be very quietly assertive and still be effective.

And it’s very important to remember that because we saw some really dynamic personalities at this conference, and some of us are looking up going, wow, I could never be like Sally or whatever, but that’s not necessary. What’s necessary is knowing what you want and what you need and continually making a case for it and communicating effectively about it and not giving up, persevering.

SARAH N. SAMUELS, CFA: So if that’s not in your DNA and you’re not born with that tendency, with that mapping of the genetic code, how do you suggest that we approach some of your advice and some of your best practices, especially if some of them might just be so far away from our authentic self that it just doesn’t feel right?

JULIE JANSEN: Yeah. Well, I think it is true that authenticity is always important, as much as maybe some people don’t think it’s important, but I think it is. I think it’s just building your confidence, continually reminding yourself of what you’re good at, how you’re making a difference, that you’re meeting your values. And if you really want something in life, generally, it doesn’t fall in your lap.

And so you don’t have to be, excuse my expression, a “ballbuster.” You don’t. But you have to be assertive and ask and ask again and ask again until you start becoming comfortable with doing that, and you start getting some of the things that you were asking for. And if you’re not getting it where you are, then you’re going to go somewhere else, and you’ll figure it out. And it’s just a process that you go through as you move along in your career. For sure.
SARAH N. SAMUELS, CFA: That’s great. So, we just heard from Lucy Callaway. She talked a lot about doubt and fear and how to harness that and leverage it in a positive and productive way. How does that shake out with your framework and your philosophy?

JULIE JANSEN: Well, sad to say, I think as a younger person, I let fear motivate me a lot. I mean, I’ve been on my own since I was 15, so I have not lived with anybody since I was 15 years old. I had to support myself, so I was always fearful that I’m not going to make enough money; I’m not going to be able to support myself.

And then I finally got to a point and said, this isn’t productive for me, and it’s OK to acknowledge the fear, but then I need to focus on what’s positive and what I’m good at and what I’m learning and what I’m achieving. Those things are what are important. And so, it does require work. It isn’t easy to overcome fears and overcome a lack of confidence. It isn’t. But it is very, very viable to do so, and sometimes that can take years.

SARAH N. SAMUELS, CFA: Interesting. And you mentioned that you coach folks, men and women, between the ages of early 30s to mid 50s.

JULIE JANSEN: Well, that just happens to be my clients right now. That’s the way it is. Yeah.

SARAH N. SAMUELS, CFA: Exactly. So, what can you share with us. In looking out, it looks like we have women from various stages of their career. What takeaways or things can you share, maybe as it relates to different generations in leadership and just styles of working and how to best work with others?

JULIE JANSEN: I think that there are certain things that no matter where you are in your career it’s important to do. One of them is to build a network. I mean, there are some of you who came here who sat with everybody you know, and that’s comfortable, and I get that. Believe me, I wish I knew someone so I could sit next to someone I knew. But the truth is, you’re not leveraging the opportunities by having very, very superficial conversations.

And so, I think toward the end, the finish of this conference this evening, try to just dig in and have two or three more meaningful conversations with people and follow up with them. And try to do the same things inside your organization. Just because you will always need a network, and your network will always need you, and LinkedIn certainly makes it easier to do that.

Find, ask for a coach, hire a coach yourself, find a mentor that can mentor you about something specific. Get serious about assessing what you can work on, whether it was a plethora of things that we talked about today or something else that might be impeding your progress in your particular role. So, don’t just be a workhorse. Don’t just put your head down and take care of your
kids and work and take care of your kids and work. Think bigger about yourselves and your careers and what is necessary, and it will be a lot easier if you keep doing these things as you move along.

SARAH N. SAMUELS, CFA: Excellent. Well, thank you so much, Julie.

JULIE JANSEN: Oh, you’re welcome.