

THE CONSCIOUS LEADER

EMPOWERING THE NEXT
GENERATION OF CEOs



TIFFANY JOY BASSE

THE CONSCIOUS LEADER

Empowering the Next Generation of CEOs

By Tiffany Joy Basse

BUSINESS BOOKS SERIES

Published by Venture Within Publishing

Copyright © 2026 Tiffany Joy Basse

All rights reserved.

Table of Contents

Dedication.....	3
Introduction: So You Want to Be a Conscious Leader?.....	4
PART I: THE NEW LEADERSHIP REALITY.....	6
Chapter 1: The Evolution of Leadership.....	6
Chapter 2: The Mindset Reset.....	10
Chapter 3: Emotional Intelligence in Action.....	15
Chapter 4: The Power of Presence.....	21
PART II: LEADING TEAMS.....	26
Chapter 5: Psychological Safety and True Empowerment.....	26
Chapter 6: Conscious Communication.....	31
Chapter 7: Culture by Design.....	36
PART III: LEADING THROUGH CHANGE.....	41
Chapter 8: Strategic Vision That Works.....	41
Chapter 9: Change and Innovation Leadership.....	46
Chapter 10: Crisis Leadership and Resilience.....	50
Chapter 11: Ethics and Stakeholder Leadership.....	55
Chapter 12: Power, Influence, and Politics.....	60
PART IV: PERSONAL MASTERY AND LEGACY.....	65
Chapter 13: The Sustainable Leader.....	65
Chapter 14: Leading in the AI Era.....	70
Chapter 15: Your Leadership Legacy.....	76
Worksheets and Resources.....	80
Source Notes.....	119
A Note of Gratitude.....	128

Dedication

For my children,

My entire life, even before I met you, I have wanted to make the world a better place for you and the generations who will follow.

Being your mother is the greatest privilege of my life. Loving you taught me that motherhood does not stop at the edges of our family. It has made me care deeply about the world you will inherit and the world you will leave behind.

In that sense, I have always felt called to mother more than my own children.

To mother the world.

This book is part of that promise.

Introduction:

So You Want to Be a Conscious Leader?

(Without Burning Out or Losing Your Soul)

I founded my first technology company at twenty-six and was leading MsMoney at thirty-three. We hired a hundred employees and contractors during MsMoney's first year, and my task list was full before sunrise. In the decades since, I have coached hundreds of founders and CEOs trying to make good decisions under similar pressure. Some days, being conscious can mean little more than staying awake through the next meeting.

This book is about how to carry the responsibility of leadership: make sound decisions, treat people fairly, and build a working life you can sustain. I wrote it for founders, small-business owners, and people managing teams of any size. You may be responsible for a handful of people while doing much of the daily work yourself, or you may lead through several layers of managers. Some of the lessons here came from choices I would make differently now.

What I Mean by Conscious Leadership

By conscious leadership, I mean paying attention to how you lead and taking responsibility for its effects. Notice the assumptions and emotions influencing a decision, listen to the people affected, and make a considered choice. Explain that choice and follow through, including looking at what happened and what you need to change.

I spent much of my career in technology and finance, often in rooms where women were a small minority. I saw demanding leaders rewarded, including some who treated fear as a management tool. I wanted a different way to lead, with high standards and room for people to question how we achieved them.

Self-awareness and empathy need to show up in clear responsibilities, fair expectations, manageable workloads, and appropriate support. People should be able to raise a concern or disagree with you. They can also care about the work while having different values, ambitions, or limits from yours.

Mindfulness, for me, is practice in noticing what is happening before reacting. Intuition can alert me to something I need to examine. I still have to test my assumptions, hear another view, and look at the evidence.

As a mother, I also think about the workplaces my children and their peers are inheriting. The way we lead helps shape those workplaces, including what people learn to expect from the person in charge.

What This Book Will Help You Practice

The chapters address decisions that can be uncomfortable even when you understand the principle: giving difficult feedback, delegating responsibility, responding to a mistake, setting a boundary, or making an ethical choice under pressure.

Alongside my own experiences, you will find public leadership case studies. Those leaders made choices in particular circumstances, and many factors contributed to the outcomes described. Use the cases to examine decisions and tradeoffs, then consider what would apply in your situation.

Part I starts with the habits and assumptions you bring to leadership, including emotional intelligence and presence. Part II turns to the conditions you create for a team through trust, communication, and culture. Part III connects vision and strategy with decisions about change, crisis, ethical pressure, and the use of power. Part IV considers how to sustain your work, lead responsibly with AI, and help others grow into leadership.

Each chapter ends with **One Practice** and **Three Questions**. The practice gives you an action to try. The questions invite you to examine your own situation, including the gap between what you intend and what other people experience.

This is the third and final book in my Business Books Series, following *Pitch Perfect* and *The Growth Code*. You can read it on its own.

How to Use This Book

Read straight through or begin with an immediate need. Chapter 6 addresses difficult conversations, Chapter 10 supports the decisions and follow-through a crisis demands, and Chapter 13 focuses on sustaining yourself and your work. Whichever route you take, keep a real situation in mind as you read.

Try the chapter's **One Practice** and set a review date that fits the action. Allow for any observation period the practice calls for. Make a short note of what you did, what happened, and what you would change. Where appropriate, ask the people affected what changed for them. Use the **Three Questions** to examine the situation more closely before adding another practice.

If it would help, discuss a chapter with a colleague you trust. You can also work through it privately. Reflection does not require sharing personal information with a team.

Be patient with yourself, and take responsibility when you get something wrong. If a familiar reaction returns under stress, pause, acknowledge the impact, repair what you can, and reconsider what the situation requires. Sometimes that includes changing the work arrangements or getting support.

Eight optional worksheets, completed fictional examples, and further reading are included in **Worksheets and Resources** at the back. Choose the resource that fits a decision or conversation you are facing now.

Chapter 1: The Evolution of Leadership

The Leadership Habits We Inherit

In 1995, I was in my late twenties, running a web development company that worked with five Fortune 100 clients. In many of the rooms around me, leadership came with a corner office and an expectation that decisions would travel downward. The person giving the instruction did not necessarily feel obliged to explain it.

I have since built companies and coached hundreds of founders and executives. The settings have changed, but the temptation to confuse being in charge with knowing best is familiar. Your team might work in one building, across screens, or out of a small shop. Wherever you work, people need enough information to do their jobs and a way to tell you when a decision creates a problem.

Experience, clear instructions, and the willingness to make an unpopular decision still matter. How you use that authority also affects what you can learn from the people doing the work.

Using Authority Well

I have heard leaders complain that people ask why instead of simply doing what they are told. Raising two children made that question familiar to me. My children wanted an explanation even when they were young, and I expected a degree of resistance I had not been allowed as a child. Parenthood gave me plenty of practice explaining myself. It also made me less inclined to treat a request for a reason as an insult.

At work, the explanation helps another adult exercise judgment. Someone who understands the purpose of an assignment can notice when the proposed approach will miss it. They may see a customer problem, a scheduling conflict, or a risk you have overlooked. A question can improve the decision even when you remain responsible for making it.

Be clear about what is open for discussion. If you are consulting the team before deciding, say so. If a decision has been made, explain the reason and identify what people can still influence. Delegating a task should include the authority, information, and resources needed to carry it out. Gathering advice while retaining the final decision is legitimate when people understand the arrangement. Repeatedly taking back decisions you agreed to delegate leaves people unsure what they can do.

Some situations require immediate direction. During a safety incident, people may need a clear instruction and a named person in charge before a full discussion is possible. Explain what you can, act on the information available, and leave a way for people to alert you to danger or missing facts. Return to the reasoning and the consequences when the immediate situation is under control.

The same distinction matters in ordinary work. A team does not need a vote on every purchasing decision. It does need to know who can approve a purchase, what the spending limit is, and where to go when the usual process will not solve the problem.

Taking Emotions Seriously

Earlier in my career, I often heard the advice to leave your feelings at the door. Unfortunately, the feelings tend to come in with the person.

Emotional intelligence means noticing emotions, considering what they may be telling you, and choosing how to respond. A leader's frustration may point to an unclear agreement, an unreasonable workload, or an expectation that was never communicated. It may also reflect something the leader brought into the room. Before acting, check whether your explanation fits what happened.

You cannot reliably infer a colleague's motives from a quiet meeting or a tense expression. Ask about the work and listen to the answer. Chapter 3 develops these skills in more detail. Here, begin with the expectation that handling emotion is part of your responsibility, alongside knowing the business and organizing the work.

Purpose in Everyday Decisions

When I started advising startups in the 2000s, I encountered investors who treated concern for anything beyond the bottom line as a distraction. I have spent much of my entrepreneurial life interested in what a business can contribute. That interest still has to survive contact with a budget, a customer, and a difficult choice.

A purpose becomes useful when it helps you decide what to do. If you promise customers clear financial information, for example, that commitment should influence what you publish and how you correct an error. If you say you value employees' lives outside work, it should influence staffing and deadlines. These choices may carry costs. Make those costs visible and decide how you will meet them.

People can do excellent work without sharing the founder's personal mission. Someone may value dependable pay, a useful skill, or hours that allow them to care for family. Respect those reasons. A meaningful mission does not settle questions about fair compensation or make an unmanageable workload reasonable.

Measuring the Work

Revenue, margin, and cash matter. So do the conditions under which the team produces those results. A delivery record can look impressive while people work repeated weekends to maintain it. Customer growth can conceal a growing backlog of unresolved complaints. Looking at one favorable number can leave you unaware of a problem you are responsible for addressing.

Choose measures that help with the decision in front of you. If delivery is slipping, look at commitments completed, rework, and workload together. Ask the people involved where work gets stuck. You may need clearer priorities, more capacity, a different method, or fewer promises. Good relationships can help you have that conversation; they cannot do the financial or operational work for you.

Use what the measures reveal to decide whether the plan needs to change. Give unwelcome information a fair hearing, and review the consequences for customers, employees, and others affected as part of running the business.

CASE STUDY: Mary Barra and GM's Safety Crisis

In 2014, early in Mary Barra's tenure as CEO of General Motors, the company faced a crisis over faulty ignition switches linked to fatal crashes. The defect could prevent airbags from deploying. Barra apologized in testimony before Congress on April 1, after meeting privately with some victims' families the day before. Those steps acknowledged responsibility in a situation where people had suffered irreversible harm.^[1.1]

GM commissioned an outside investigation led by Anton Valukas and made its findings public. In June, the company reported that fifteen people were no longer employed there and five others had been disciplined. It also announced a compensation program to be administered independently by Kenneth Feinberg. The response included a senior safety role, additional investigators, the Speak Up for Safety reporting program, and changes that moved recall decisions to higher levels of the company.^[1.2]

Those announcements did not end GM's accountability. In September 2015, GM entered a deferred prosecution agreement, which postponed prosecution subject to specified conditions. GM admitted failing to disclose the defect to its regulator and misleading consumers. It agreed to a \$900 million forfeiture and oversight by an independent monitor. The Justice Department also credited the company's subsequent cooperation and compensation efforts.^[1.3]

For me, the useful leadership lesson is the connection between what a leader says and what the organization is equipped and required to do. An invitation to speak up needs people who can investigate, authority to act, and a way to check that the action happened. A sincere apology also leaves practical obligations to those harmed. The case gives us decisions to examine, without establishing that one leader or one program resolved every underlying failure.

In a small business, start by making responsibility visible: who receives a concern, who investigates it, who can make a decision, and when the person raising it will hear back. Give people another route if the concern involves the person who normally receives reports. A leader's accessibility matters most when someone brings information the leader would rather not hear.

One Practice

Choose one real decision you need to explain this week. Before the conversation, write down the reason, the constraints, who is responsible, and what remains open to input. Check whether you have a sound reason or simply a preference you have never examined.

Sample—fictional project explanation: "The client needs the essential work for Friday's event. I have confirmed what they consider essential. Please review that scope against our quality requirements and agreed hours by noon today, before we commit to delivery. If it does not fit, I will discuss a smaller scope with the client or arrange the support we need. Once we have agreed on feasible limits, you can organize the work. Please raise any urgent risk as soon as you see it, including after our check-in."

Give your explanation, then ask what is unclear and what concern remains. Allow the other person to disagree or supply information you did not have. Offer a chance to respond later or in writing if an immediate answer is difficult. If you cannot share a detail, explain the relevant limit without inventing a reason. Confirm the next action and who owns it.

Afterward, make a short note of what the conversation clarified or changed. Review whether the decision still makes sense in light of what you learned, as well as whether you explained it clearly. At the next relevant check-in, ask whether the person had enough information and authority to act.

In Worksheets and Resources: [Resource 2](#) Delegation and Handoff Agreement.

Three Questions

1. When someone last asked why you had made a decision, what did you explain, and what did you learn from the question?
2. Which recurring decision could your team make with clearer authority, information, or limits?
3. What could make a current result look successful while hiding a cost to employees or customers?

Chapter 2: The Mindset Reset

Unlearning Leadership Myths

When I ask people in a leadership session to reconsider what they think they know, I am asking them to examine ideas that may have helped them succeed. That can be an uncomfortable place to begin. After coaching hundreds of founders and executives, I have learned to pay attention to the belief behind a decision, especially when the same problem keeps returning.

Some beliefs came from an early boss. Others came from family, professional training, or getting a business through a difficult year. You do not have to discard a habit because it is old. First work out what it does in the situation you face now.

Three familiar beliefs deserve that examination.

"Leaders must have all the answers." Expertise matters, but you will encounter questions outside it. A useful admission of uncertainty includes a plan: what you need to find out, who can help, and when you will decide. "I don't know" can begin responsible leadership; leaving the team without a next step does not complete it.

"Never show weakness." Hiding a mistake can leave other people making decisions with inaccurate information. Name what happened, acknowledge your part, and explain what you will do. You can be honest about a limit while continuing to carry your responsibilities.

"Emotions have no place in business." Emotions give you information that needs interpretation. Frustration might alert you to a repeated problem, or to an assumption you need to revise. It does not establish another person's motive or make your preferred response the right one. Attend to the feeling and check your account of what happened.

Notice which belief you are most inclined to defend. Familiarity can feel like evidence, especially when a habit has worked before.

Check the Belief Against the Behavior

Self-awareness includes noticing the distance between your intention and what you actually do. You may believe you invite feedback while answering each criticism with a long explanation of why the other person is mistaken. You may value people's time while repeatedly arriving late or changing priorities without explaining what can wait. Look for a specific behavior you can examine.

Over the years, I have sat across from founders describing their company's growth while a leg bounced, attention kept returning to a phone, or a coffee cup rattled. Some described themselves as calm when I pointed out the movement. I could observe the behavior, but it did not establish what they were feeling, why they were moving, or whether anything was wrong.

I have spent more than two decades training my attention through mindfulness and somatic practice, which means paying attention to physical experience as well as thoughts. That practice helps me notice when I need to pause.

Start with what you can observe: an interruption, an unanswered question, a decision reopened without explanation. Separate that observation from the meaning you give it. Then ask for another view when appropriate. **Sample question:** "What in the way I handled that planning discussion helped or hindered your work?" This gives a colleague something more concrete to answer than a general request to assess your self-awareness.

Thank the person for the information, take time to consider it, and return with what you will change or why you reached a different conclusion. They are offering a perspective, not taking responsibility for your development. Your calendar and work records can also reveal habits without requiring someone else to point them out.

Useful Vulnerability

There is a difference between an honest admission and a carefully curated failure story that somehow ends with the speaker looking brilliant. A humble brag in costume is still a humble brag.

Useful vulnerability gives people information they need and makes responsibility clear. You might acknowledge that your estimate was wrong or that you need expertise you do not have. Share enough for people to understand the effect on the work and the next action.

Sample wording: "I approved this deadline without checking your current workload. I will review the priorities with you today and discuss the necessary changes with the client. I'll update you by the end of the day."

Personal disclosure should have boundaries. Employees do not owe you reassurance or private stories in return for yours. Seek support from an appropriate friend, mentor, coach, or professional when that is what you need. Within the team, leave people free to decide what they share about themselves. An admission can open a conversation; consistent conduct gives people a reason to trust it.

Room to Question a Belief

You will have a harder time examining your assumptions if people expect embarrassment or punishment for questioning them. Amy Edmondson uses psychological safety to describe a team's shared belief that people can take interpersonal risks, such as asking for help or raising a concern. Her 1999 study of fifty-one teams in one manufacturing company found an association between psychological safety and learning behavior. It did not establish that safety alone caused better performance.^[2.1]

Make a good-faith question welcome even when it is inconvenient or the person has no solution yet. Respond to the concern, assess what happened, and follow through. Fair

expectations and accountability remain part of the work. Chapter 5 develops the conditions and reporting arrangements that support speaking up.

The Growth Mindset in Practice

Carol Dweck's growth mindset describes the belief that abilities can develop through effort, effective strategies, and help from others. Applied to leadership, it invites you to examine how someone could improve, including yourself, before treating a difficulty as a fixed trait.^[2.2]

A large 2019 study in U.S. secondary schools found that a brief growth-mindset intervention improved grades for lower-achieving students, with benefits varying by school context. Those findings concern students' learning and do not establish what the approach will achieve in a workplace.^[2.3]

At work, make learning possible. Give specific feedback about the approach and the result. Protect time for practice, make relevant help available, and review whether the new approach improves the work. Praising effort while leaving someone without the time or tools to succeed is frustratingly incomplete.

When a project fails, examine the expectations, decisions, resources, and execution. An experiment with a reasonable limit on the potential harm is different from repeatedly ignoring a known safety requirement. Learning from a failure can sit alongside repairing harm and addressing misconduct. It also requires being willing to stop an approach that is not working.

CASE STUDY: Indra Nooyi's Performance with Purpose

Indra Nooyi led PepsiCo as CEO from 2006 to 2018. Her Performance with Purpose strategy put financial performance alongside product nutrition, environmental priorities, and the development of people.^[2.4] The leadership question was how to give those commitments a place in investment, product, and operating decisions, especially when priorities competed.

PepsiCo reported that its own Good for You and Better for You categories rose from about 38 percent of revenue in 2006 to roughly 50 percent in 2017. These were company-defined categories and a share of revenue, rather than an independent finding that half of its products were healthy.^[2.4]

The company's 2016 annual report also described an improvement of more than 25 percent in water-use efficiency across its global production locations from 2006 to 2015. An efficiency measure does not establish the same reduction in total water consumed. That distinction matters when you decide whether a commitment needs a more demanding target.^[2.5]

Nooyi also described writing thank-you letters to her direct reports' parents.^[2.6] This raises a smaller assumption worth examining: that the recognition you would appreciate will suit someone else. Ask how an employee wants to be recognized before involving their family. A personal gesture that one employee values may intrude on another's privacy.

I take from this case the value of examining an assumed choice and making the alternative concrete. Product and environmental priorities became things the company could measure and discuss alongside financial performance. The reported changes do not prove that one philosophy caused the company's results or settled the tensions among those priorities. A smaller business can use the same discipline: identify the commitment, consider its cost, and choose a measure that would show whether the work supports it.

A Belief You Can Test

Illustrative scenario—fictional people and situation. Alex owns a service business with five employees and believes that giving an answer first keeps planning meetings efficient. In the last meeting, Alex proposed a plan and no one offered an alternative. Two employees later raised scheduling conflicts privately. Alex does not yet know whether speaking first discouraged discussion or whether the conflicts became clear afterward.

Here is Alex's completed test plan. It records a proposed action, with the result still pending.

Belief to examine: "If I speak first, we reach a workable decision faster."

Comparison: Check recent meeting records for duration and decisions later reopened. If those were not recorded, use the two meetings to establish a starting point; they cannot show that the approach is faster.

Action: In two routine planning meetings next week, ask for proposals before giving a view. Send the question in advance so people can also contribute in writing. Alex will still make the final decision and explain it.

Limits: Keep the existing deadlines and quality requirements visible. Do not use the trial for an urgent safety decision or require anyone to share personal information. Allow five additional minutes for discussion.

Review: After the second meeting, review the time spent, concerns raised, and clarity of responsibilities. Ask the team whether the change made it easier or harder to contribute. Check again one week later for scheduling conflicts that emerged afterward or decisions that had to be reopened. Compare with earlier records where available, then decide whether to keep, adjust, or stop the approach. Two meetings may suggest a useful next step without settling the question.

One Practice

Choose one leadership belief to examine this week. Write it as a sentence linking your action to the result you expect, as Alex did. Add one recent observation that supports it and one that makes you question it. If you have no evidence either way, say so.

Choose a small, reasonable change in a routine situation. Describe what you will do differently, what responsibilities remain yours, and what support or information others need. Explain any change that affects their work and invite questions. Keep it within agreed

working time; adjust other commitments if it needs extra attention. Keep required safeguards in place and respond to urgent risks immediately.

Set a review date that gives the action time to produce something observable. Record what happened, what it cost in time or effort, and what the people affected noticed. Note other changes that could explain the result, such as staffing or demand. Decide whether to keep the change, adjust it, or try something else. An inconclusive result is a reason to examine the test, not a verdict on your ability to lead.

In Worksheets and Resources: [Resource 3](#) Small Change and Review.

Three Questions

1. Which leadership belief feels hardest to question, and what evidence would make you reconsider it?
2. Where does a recent action or calendar choice conflict with what you say you value?
3. What would make it easier for someone to question your assumption, and what could you change within your own authority?

Chapter 3: Emotional Intelligence in Action

A child often senses the mood of a house before dinner is served.

A team notices the mood at work, too.

What EQ Actually Does at Work

I watched two executives, in the same company, present nearly identical restructuring plans. The first charged through his slides while arms crossed and eyes dropped around him. When he finally asked for questions, the room was quiet. The second noticed similar signals gathering, set her slides down, and said, “I can see there’s concern in the room. Before I continue, help me understand what you’re thinking.” Her meeting became a planning discussion. She had made room for people to tell her what the slides had not answered.

Similar plans, same company, different conversations. In Chapter 2, we looked at the beliefs and reactions a leader brings to work. Emotional intelligence, often shortened to EQ, means noticing emotions in yourself and others and using that information thoughtfully. At work, its value shows up in what you ask, how you respond, and what you do with what you learn.

Four related skills give us a useful place to start. They draw on a familiar emotional-intelligence framework, and you can work on more than one at a time.^[3.1]

Notice your own emotions. Recognize anxiety, frustration, excitement, or overconfidence and consider how that feeling might be affecting your judgment.

Choose your response. Decide how to act while you are feeling what you feel. You may need to pause, ask a question, set a boundary, or address a problem directly.

Pay attention to other people. Notice what they say and do, then check your understanding. Their expression or silence does not tell you the whole story.

Respond with care and responsibility. Listen, explain decisions, and address the work or conduct at issue. Another person can feel understood and still disagree with you.

These skills become particularly useful when the work is crowded, urgent, and personal. At MsMoney, our core team of thirty employees was crammed into three work/live lofts on Indiana Street in San Francisco’s Dogpatch neighborhood. Office space was scarce, so we moved with the Women’s Technology Cluster, the incubator later known as Astia, and leased through them. The pressure was high, and communication was suffering.

I hired a culture coach who worked three days a week with leaders, teams, and individuals who were struggling to communicate or carrying resentments they could not easily resolve. I could see that technical talent alone was not helping us work through those difficulties. We needed time and help to address them. A coach also could not make my decisions about workloads, responsibilities, or unacceptable behavior for me.

Checking Your Own Impact

Good intentions can arrive differently than they left. What feels like decisiveness to you can sound dismissive to the person who has not finished explaining a risk. Your excitement about a deadline can land as pressure on someone who knows the work will take longer. The useful question is what happened in the interaction, including anything you need to put right.

Authority can make that harder to discover. Someone whose assignments or pay you influence has reasons to weigh an honest answer carefully. Asking for candor helps only if your response, and what happens afterward, give people reason to keep offering it.

After hearing more than a thousand pitches, I have learned to pay attention when a founder's account of their leadership differs from what I can observe. A founder describes being a great listener while finishing my sentences. Another says the team can push back on anything, while no one else speaks. That silence is a reason to ask more, rather than proof of what the team feels. The interruptions, however, are something we can discuss directly.

One CEO I advise blocks a short pause after significant meetings for three questions:

How did I show up?

What impact did I have?

What would I do differently?

That small review is useful because it is close to an actual event. If you try it, separate what you observed from what you assume. You may know you interrupted twice; you may not know whether someone left feeling dismissed. Check the decision and your follow-through, and ask for feedback where it would help.

Sample feedback invitation: “In today’s meeting, I interrupted while you were explaining the delay. I’m sorry. I’d like to hear what I missed and how my interruption affected the discussion. You can tell me now or send me a note later.” Ask privately, leave room for the person to decline, and listen before explaining yourself. Thank them without turning their feedback into a public performance. Later, let them know what you changed or why you took another course.

Your body can offer clues to your own reaction: a tight jaw, a short breath, the urge to interrupt. Those sensations can have several causes, so treat them as a prompt to pay attention. I have spent twenty-five years in mindfulness and somatic practice—paying attention to bodily sensations—and one of its most useful gifts to me as an executive has been noticing the wave while it was still ankle-high. If focusing on your body is uncomfortable or unhelpful, try looking at a fixed point in the room or writing down the decision in front of you.

Reading the Room, Including the Rectangles

Reading a room starts with enough attention to notice a change and enough humility to ask about it. A folded arm, a delayed answer, or an unfamiliar tone might matter. It might also

reflect discomfort in a chair, a language difference, fatigue, or something unrelated to the meeting. Research on facial expressions cautions against treating a face as a dependable code for someone's emotional state; context matters.^[3.2]

The second executive at the opening of this chapter gave people a chance to explain their concerns. That is the part worth borrowing. You do not need to be certain what someone feels before asking what you have missed.

The same care applies on video and in chat. A camera that goes dark, a brief reply, or a pause before speaking is not a diagnosis of disengagement. Ask about the work and offer ways to contribute. Someone may have a concern they prefer to raise privately, or simply need time to think. They do not owe the meeting an explanation of their home, health, or feelings.

Sample opening for a difficult discussion: “This decision affects several people’s work. Before we settle it, I want to understand the concerns and the options we may be missing. You can raise them here or send them to me afterward; I’ll confirm when we need to decide.” Give people the information and time that invitation requires. An invitation after the decision is already fixed should say honestly what can still change.

Regulation When the Stakes Rise

Across pitch rooms and hundreds of coaching relationships, I have seen how a founder’s response to pressure can shape a conversation. A rushed accusation can derail a useful explanation. A measured question can leave room for it. In an experiment with student groups, a leader’s mood influenced group members’ moods and some group processes.^[3.3] In everyday work, pay attention to the influence you have while leaving other people room for their own responses.

Emotional regulation means working with how you experience and express emotions. At work, that can help you choose conduct suited to the situation. You can be angry and still be fair. You can feel anxious and still make the urgent call.^[3.4]

I have met fellow venture capitalists who said flatly that they would not invest in an entrepreneur who did not meditate. I understand their concern about how founders handle pressure, and meditation has been valuable in my own life. Their preference does not establish someone’s fitness to lead. Look at how a person makes decisions, responds to challenge, and treats people; a particular personal practice should not become a requirement for your employees.

A few small habits are worth trying before a difficult response:

Take an easy, unforced exhale or feel your feet on the floor. Use whichever helps you return your attention to the situation.

Name the feeling to yourself in ordinary words: “I am angry,” or “I am worried about the deadline.” Then distinguish that reaction from the facts you need to address.

Pause long enough to choose your next sentence. If you need a longer break, say when you will return and make sure an urgent issue has someone responsible for it.

These are ways to create a little room for judgment. If someone is at risk, act on the risk while you steady yourself. A pause that becomes avoidance leaves the other person with the problem.

I learned the cost of excusing harmful behavior at MsMoney. I had hired an operations executive whose aggression I kept explaining away, right up until my five-person engineering team came to me together, one week before launch, with an ultimatum: her or us. All five, seven days before everything we had built went live. I fired her immediately. The team stayed, and we launched a week later.

The lesson has stayed with me because I had been paying attention to her results and missing what it was like to work with her. By the time I acted, all five engineers were prepared to leave days before launch. I had let the problem reach that point. That was a failure of my leadership. The work should not have depended on five people reaching the end of their patience together.

Take reports of harmful conduct seriously, address any immediate risk, hear the relevant accounts, and use an appropriate process to decide what must change. A small company may need experienced outside help. People should be able to report a problem before they have a solution—or an ultimatum. Asking them to manage their emotions cannot substitute for addressing the conduct.

Making EQ Part of the Work

Your example matters, particularly when you have made a mistake. If you praise emotional intelligence in a speech and then behave like a toddler in the Monday meeting, the speech has some competition. Acknowledge what you did, repair what you can, and change the behavior people will see next time.

Give this attention a place in ordinary work. At a project review, ask where communication helped, where people lacked information or support, and what made the workload difficult. People can answer about the work without disclosing personal feelings. Choose an action, name who will take it, and return to it at the next review.

Recognition and promotion decisions matter, too. Consider how a manager achieves results: the clarity of expectations, the response to mistakes, the distribution of work, and the treatment of colleagues. Retention or a pleasant meeting alone cannot tell you all of that. Use more than one source of information, and avoid rewarding a strong sales result while repeatedly excusing the damage around it.

CASE STUDY: Satya Nadella, Empathy, and Difficult Decisions

Satya Nadella became Microsoft's CEO on February 4, 2014. In an interview recorded in September 2017, he described learning about empathy through raising his son Zain, who had cerebral palsy. Watching his wife, Anu, care for Zain helped him gradually shift his attention from the disruption to his own plans toward what his son needed from him as a father.^[3.5]

At an October 2017 event, Nadella described encouraging a “learn-it-all” culture and changing organizational structures so teams could consider products through customers’ needs. His account linked a learning attitude with changes in how the work was organized.^[3.5]

His tenure also included decisions with painful consequences. In July 2015, Microsoft announced a restructuring of its phone hardware business and plans to cut up to 7,800 positions, primarily in that business. The announcement explained a change in strategy; it cannot tell us how well each person affected was treated.^[3.6]

I find the tension useful. A leader can talk convincingly about empathy and still has to answer for decisions that affect people’s livelihoods. The test includes whether people receive clear information, whether their circumstances inform the process, and what practical support the organization provides. Listening may improve a decision without making it welcome.

For a smaller team, curiosity can be quite concrete: ask what a colleague knows that your plan leaves out, listen to the answer, and explain what you will do with it. Keep accountability for the decision with the person who has the authority to make it.

One Practice

For one week, choose one recurring situation that tends to stir you up: a missed deadline, a challenging question, or an email you want to answer too quickly. Before responding, take a brief pause if the situation allows. Notice a feeling or bodily cue, or use an external point of attention if that suits you better. Separate the work issue from your reaction, then choose one useful action. Make a short note before responding, or immediately afterward if writing would interrupt the conversation.

Sample—fictional situation: A colleague has missed a deadline for a draft. You notice frustration and the thought that they do not care. The known fact is that the draft is late; the reason is still unclear. A possible opening is: “We agreed on a draft this morning, and I don’t have it. What has happened, and what can we realistically complete today?” The next step is to hear the answer, agree on feasible timing and responsibilities, and decide what other work may need to change.

After the conversation, take a minute to review what you actually did. Did you get the information you needed? Is there an action to complete or something to repair? At the end of the week, choose one response to keep practicing and any work problem that needs attention beyond your own reaction.

In Worksheets and Resources: [Resource 1](#) Conversation Preparation and Follow Through.

Three Questions

1. In a recent tense conversation, what did you observe, what did you assume, and how did each affect your response?
2. What interpretation of a colleague’s behavior needs checking, and how could you ask without pressing them to disclose personal information?
3. What effect of your own behavior needs a repair or a practical change, and when will you follow through?

Chapter 4: The Power of Presence

Your calendar can double-book you; your attention has a harder time.

Being Here Now, When Your Calendar Says Otherwise

Illustrative scenario—fictional people and situation: A founder checks messages during a strategy discussion. The team agrees on a launch date, including the reasoning for it, but the founder misses part of the conversation. The next morning, she challenges the date. Before changing the plan, she needs to hear the reasoning she missed and acknowledge her part in the confusion. The team now has another discussion to fit into its day.

Leadership hands you a strange assignment: be fully in this moment while planning the next quarter, digesting the last one, and carrying forty unread messages that all claim to be urgent. It is easy to arrive in a conversation with most of your attention still somewhere else.

Presence becomes useful when you can hear what matters, understand the decision in front of you, and carry through on what you agree. Sometimes that calls for an attentive conversation. Sometimes it calls for rescheduling one you cannot give enough attention to, with a clear plan for anything that cannot wait.

Small changes can make that more workable:

Close the previous loop. Before moving to the next meeting, record the action you still need to take. Give the unfinished thought somewhere to go besides the next person's conversation.

Prepare for the purpose. Know whether people need a decision, feedback, information, or room to work through a disagreement. Read the material and block preparation time for consequential conversations. A thirty-second pause cannot make up for an unread proposal.

Arrange your attention. Silence avoidable notifications and put distracting devices aside. Keep what you need for access, notes, or an urgent responsibility. If you must remain reachable for a specific issue, explain that at the start and arrange cover where possible.

Return when you drift. Notice when your mind has left the conversation and come back. If you missed something, ask for it again. Before closing, check the decision, who owns the next action, and when anyone needs an update.

Presence Under Fire: The MsMoney Launch

In 2000, I was standing at the front of the room in our Dogpatch offices in San Francisco as MsMoney launched its website and financial services. Hillary Clinton, then the First Lady, stood beside me for the ribbon cutting. We had paid for a satellite truck outside to make the launch footage available to television stations in news markets across the country. I had invited a woman whose public profile could bring attention to women's financial empowerment, and there I was, wondering whether our digital curtain would open.

It had been glitchy beforehand. At the climactic moment, the screen went black, and I wondered whether the system was going to crash. I breathed, felt my feet on the stage, and stayed with the presentation. I also made a joke. There is only so much dignity available when your grand reveal declines to reveal anything.

I wanted to help everyone, including myself, relax during the pause. The event continued, and the launch drew national media coverage. What I remember about the glitch is that I could remain with the people in front of me even while I did not know what the technology would do next. The recording is linked in the Source Notes.^[4.1]

That experience has stayed with me when I coach leaders through difficult moments. At my launch, there was room for humor; a serious incident may call for immediate protective action. Being present means paying enough attention to tell what the situation needs.

When something goes wrong, steady yourself as you act. Establish what is happening and who is affected. Assign someone to the immediate response and get the appropriate help. State what you know, what remains uncertain, and what you are doing next. Name a time and channel for the next update, then check that the actions were completed. In a small team, a named owner and a backup may matter more than a complicated response chart.

Leave room for people to tell you what the response has missed, especially those closest to the problem. They may be frightened, angry, or focused entirely on the practical work. They do not need to match your emotional tone to help. Chapter 10 develops crisis leadership in more detail.

Being Available Without Being Everywhere

There is only one of you, however ambitious the calendar becomes. If every difficult decision or request for reassurance requires your immediate presence, both you and the team have a problem to solve.

I learned something about the cost of constant availability from someone I hired at MsMoney. My executive colleagues included three Harvard MBAs, one Berkeley MBA, and a Princeton-educated lawyer who served as editor in chief. Each was a decade or more into her career. One accepted half of her previous salary. She had spent a week in the hospital after the strain of the always-on life at her previous company.

That knowledge sat uneasily beside my own habits, because I was now living the company 24/7. Her experience should have prompted me to examine what kind of working life I was building. A different salary or an inspiring mission could not, by itself, answer that question.

A dear friend in a senior role at an AI startup aiming for its first public share offering was working fourteen-hour days. I told her the pace was not sustainable. Pressure came from her boss and from the people she managed, who also expected her to be available at what seemed like every hour. After nine months at that pace, she had to take medical leave. The work arrangements needed attention long before that point.

A leader can care deeply about a team and still help create expectations no one can sustain. Set out when you are available, what counts as urgent, and who can help when you are away. Give people the goal, relevant information, limits, and authority to make the decisions that belong to their roles. Agree on what must be escalated and to whom. A sound decision may look different from the one you would have made.

Regular, well-prepared conversations can support that independence. Use them to surface obstacles and decisions people actually need from you. Between those conversations, let agreed authority mean something. Check whether your arrangements work for the team, including the person covering your absence.

Presence Through a Screen

I have seen commanding in-person executives shrink to a distracted thumbnail, and quieter leaders find that a video conversation suits them. Using people's names warmly, leaving time for an answer, and making room for someone who has been interrupted can matter in either setting.

For remote conversations, make the practical arrangements explicit: a usable connection, accessible materials, a clear purpose, and a way to contribute. Ask what helps people participate. Depending on the work and the people involved, that may mean video, audio, captions, chat, or written input before or after the meeting. Agree on the format with the people doing the work.

Match the format to the work. A small group may be right for a sensitive disagreement; a larger briefing may be useful for shared information. Summarize decisions and responsibilities in a place people can find them. Arrange any private follow-up before the meeting ends.

The Recovery Factor

The leaders I know who sustain useful attention make room to step away from demands. That takes decisions about workload and coverage as well as personal habits. Putting a break on a calendar does little if everyone understands it can be interrupted by any new request.

Start within the day. Leave a little space after a demanding interaction when you can, especially before another person needs your attention. Within the week, protect a block for thinking or recovery and agree on who will handle anything genuinely urgent. Check whether the person providing cover has the capacity to do it. If the plan depends on their overwork, revise the plan.

Longer periods of renewal need similar preparation. Decide what can pause, what can proceed without you, and what support the team needs. I will say more in Chapter 13, because I learned the cost of skipping recovery in my own body. For now, choose one change to the workweek that makes sustained attention more realistic, and see whether it helps.

CASE STUDY: Jacinda Ardern After Christchurch

The terrorist attacks on two Christchurch mosques on March 15, 2019, killed fifty-one people. In her statement that day, New Zealand's Prime Minister Jacinda Ardern spoke about people from refugee and migrant communities and said, "They are us." The words publicly affirmed belonging at a moment of terrible loss.^[4.2]

The following day, she met community leaders and visited family members and friends in Christchurch. Her update addressed concerns about security at mosques and burial arrangements. On March 19, she described practical support, including a community welfare center, priority visas for relatives overseas, and funeral and repatriation costs. In the same parliamentary address, she declined to name the attacker and urged attention to those who had been killed.^[4.3]

On March 21, her government announced plans to ban military-style semi-automatic firearms and assault rifles and introduced an interim restriction while legislation was being prepared. The public statements connected recognition of the harm with decisions and assigned public responsibilities.^[4.4]

The response also required work long after those first appearances. The Royal Commission's 2020 report described problems coordinating support and recommended a continuing point of contact to help affected families, survivors, and witnesses navigate services. Public solidarity had not removed the need to improve what people could actually access.^[4.5]

The gaps in continuing support show why attention has to extend beyond a leader's first public response. Listen to the people affected, explain the action, and keep checking whether the promised help reaches them.

One Practice

This week, choose one recurring meeting and give it a deliberate transition. Before it begins, take thirty seconds to record the unfinished action from the previous conversation, settle your attention, and name what this meeting needs to accomplish. Read any necessary material in advance; this transition is the final preparation.

During the meeting, notice when your attention drifts and return. Before you finish, check your understanding of the decision or issue, name the next action and its owner, and agree on an update if one is needed. If the meeting has not resolved the issue, say so and arrange the next step.

Afterward, note what you understood clearly, anything you missed, and whether the transition helped. At the next agreed check-in, review whether the action happened. Use what you learn to change the preparation, length, or format of the next meeting.

In Worksheets and Resources: [Resource 1](#) Conversation Preparation and Follow Through; [Resource 2](#) Delegation and Handoff Agreement.

Three Questions

1. In your last three important conversations, what did you understand well, what did you miss, and what now needs a follow-up?
2. If you were unavailable for two weeks, which decisions could the team make, which would need another responsible person, and where is that arrangement unclear?
3. What could you change in your workload or availability this week to give people better attention without shifting an unreasonable burden onto someone else?

Chapter 5: Psychological Safety and True Empowerment

Three Weeks as Furniture

When we moved to Brazil, my daughter's school asked me to sit in the back of her classroom while she acclimated to a new country and a new language. For three weeks, my job was to be furniture. I stayed unmistakably present and available if truly needed, and I was in charge of absolutely nothing. Every cell in me wanted to help, translate, smooth, or fix things for my anxious two-year-old. Instead I sat. She found her way. What she built in those three weeks was hers, in a way it could not have been if I had done the trying for her.

That classroom gave me a lasting way to think about support. My daughter could try something unfamiliar with someone she trusted nearby. At work, people bring experience, preferences, and responsibilities of their own. My question as a leader is how to make help available while leaving room for their judgment. That requires both the freedom to speak honestly and the authority to act.

What Psychological Safety Makes Possible

Psychological safety describes a team's shared belief that people can take interpersonal risks: ask a question, acknowledge a mistake, disagree, or raise a concern. In ordinary language, people should be able to say what the work requires them to say without humiliation or retaliation. They do not have to like one another, agree with the leader, or reveal private feelings to do that.^[5.1]

Amy Edmondson's hospital research offers a useful warning about appearances. Units with stronger ratings for teamwork also had more detected medication errors. Interviews and observations suggested that openness about mistakes could help explain the pattern. The study could not disentangle the actual incidence of errors from people's willingness to expose them. A low report count, by itself, could not establish safer care.^[5.2]

That distinction matters in a business, too. A quiet meeting may mean the plan is sound. It may also mean people are withholding something, have had no time to examine it, or would prefer to respond privately. Before congratulating yourself on agreement, make room to find out.

Clear standards still belong here. You can welcome an account of a mistake and examine the responsibility for it. You can hear disagreement and decide to proceed. Explain the expectations, assess what happened fairly, and address harmful conduct. People need to see that speaking up is taken seriously even when the answer is difficult.

Building Safety When the Pressure Is Real

A founder who expects the company's cash to last only four more months may feel there is no time for another concern. That is precisely when you need to know about a delivery risk, an exhausted colleague, or a promise the team cannot keep. An invitation to speak helps only if you make time to hear the answer and do something useful with it.

- **Name the pressure and examine the work.** Acknowledge a difficult deadline, then ask what must change to make the work feasible. Look at scope, priorities, staffing, and dependencies. Declaring that everyone is under pressure does not settle who will do the work or what can reasonably be delivered.
- **Be specific about what you do not know.** Identify the decision still open, the information you need, and when you must decide. People can offer more useful input when they know whether you are seeking ideas, testing an assumption, or asking them to carry out a decision already made.
- **Provide a route for concerns.** Put obstacles on the project-review agenda and offer a private way to raise them. Make clear how someone can get urgent help or report a concern about you. In a small business, that may require arranging access to another responsible person or appropriate outside support. Explain the limits of confidentiality rather than promising secrecy you cannot maintain.
- **Respond to the concern and follow through.** Thank the person in a way that respects their privacy and preferences. Clarify what is known, who may be affected, and what needs attention now. Name the next action and its owner, then return with an update. If you cannot act on a suggestion, explain why.

People should be able to bring urgent risks, suspected misconduct, ethical concerns, and problems they cannot yet solve. A proposed answer can help when someone has the knowledge, time, and authority to develop one. It must not be the admission ticket to being heard. Chapter 6 will carry that distinction into everyday communication.

You may react defensively despite your intentions. If you interrupt or dismiss someone, return to the conversation, acknowledge what you did, and hear the point you missed. One apology does not establish a new pattern; your later decisions and treatment of the person matter.

From Safety to Empowerment

Empowerment gets described more than it gets practiced. I once watched a leader proudly explain how he empowered his team. Observed in the wild, he was delegating tasks while controlling exactly how each was executed. You were empowered to do precisely what he would do, precisely how he would do it. That is micromanagement with better marketing.

For a person to own a piece of work, several things need to be clear. These are useful questions for a conversation before you delegate:

- **The result and its purpose.** What needs to be achieved, by when, and how will you judge whether it has been done well?
- **The decisions the person can make.** What can they decide independently? What needs consultation or approval, and from whom? Identify spending limits, commitments to customers, and any other material boundaries.
- **The resources and capacity.** What information, tools, budget, and help are available? What existing work will move if this responsibility is added?
- **The preparation and support.** What does the person already know, what do they need to learn, and when will you check in? Agree on what should be brought to you sooner.

The balance depends on the role and the risk. A safety procedure may require a specific method; choosing the format of an internal report usually allows more discretion. Explain the boundaries that matter and leave room within them. A different workable approach is not, by itself, a reason to take the task back.

Distinguish a responsibility already part of the role from an offer to stretch it. For a proposed stretch, ask whether the person wants it and what support would make it workable. An employee can take responsibility for excellent work while wanting a stable role and reasonable hours. Extra discretionary effort is a poor test of whether empowerment has succeeded.

The Letting Go Challenge

I coached an executive who called herself fully committed to empowerment while reviewing every decision, rewriting her team's work, and stepping in at the first wobble. When I asked what made letting go hard, she was honest: "If they mess up, it still feels like my failure. If I do it myself, I know it will be done right."

I can understand the pull of that sentence. The leader remains responsible for the work and wants to protect it. But taking over repeatedly can leave a capable person with few opportunities to practice judgment. Part of the job is to ask what support would help them make the next decision well, then allow them to make it.

Release responsibility in stages when the work calls for it. You might first discuss a proposed decision, then let the person make similar decisions within agreed limits and review them afterward. With experience, those limits may expand. Look at the reasoning, the outcome, and the information available at the time; a good result can conceal a risky choice, just as a disappointing result can follow a reasonable one.

Sample—fictional delegation agreement: An owner of a small service business asks an experienced team member to choose a supplier for one hundred printed workshop folders. The budget is \$300, including tax and delivery; the folders must arrive by noon next Thursday and match an approved design and print proof. The team member can choose any supplier that meets those conditions. A higher price, later arrival, or change to the design

must come back to the owner before an order is placed. After delivery, they will review the quality, cost, and timing, as well as whether the decision limits and information were useful.

I think about the Brazilian classroom when I am tempted to confuse helping with hovering. Being available took effort. So did resisting the urge to make every small difficulty disappear. At work, that means staying close enough to provide the agreed support and intervening when a real risk requires it, while allowing someone else's sound judgment to stand.

Making Room for Other People's Judgment

Some people want to develop as leaders; others want to deepen a craft without managing anyone. Both can exercise judgment that improves the work. Give people decisions suited to their responsibilities, interests, and preparation, and review what they learned. If every ordinary choice still requires your approval, examine whether the obstacle is their readiness or the authority you have actually released.

A hard call made well while you are on a plane can be a satisfying moment. Getting there takes clear agreements, enough support, and a leader willing to be less involved in each detail. Your importance does not have to depend on being copied on everything.

CASE STUDY: Alan Mulally and the Red Chart at Ford

Alan Mulally became Ford's CEO in 2006.^[5.3] Recalling his early business-plan reviews in a 2021 interview, he described a company expecting a large loss while executives presented green status charts. The review system used color to distinguish work on plan from problems, including problems without an answer yet.

In Mulally's account, Mark Fields finally showed a red chart for a Ford Edge launch problem. Mulally applauded and asked colleagues how they could help. Other leaders offered information and engineering support. He described later reviews becoming more candid about where work stood.^[5.4]

What I find useful in that account is the connection between receiving bad news and providing help. Fields did not have to arrive with the problem already solved. The review made it visible to people who could contribute. A supportive response mattered alongside a regular meeting, shared information, and colleagues with relevant expertise. That is something a small team can adapt without borrowing the scale of an automaker.

One Practice

At one project review or individual check-in this week, invite a concern about work already under way. Make clear that a solution is welcome if the person has one, and that it is also useful to name a risk or obstacle they cannot resolve. Offer a private follow-up rather than requiring a public disclosure.

Listen, clarify what needs attention, and agree on one next step, who owns it, and when you will report back. If immediate harm is possible, address that first. At the agreed time, check whether the original concern has been resolved or what still needs action. Review whether you did what you promised and whether the person had the authority and support to do their part. If no new concern is raised, use a previously reported obstacle whose handling you can improve.

In Worksheets and Resources: [Resource 1](#) Conversation Preparation and Follow Through; [Resource 2](#) Delegation and Handoff Agreement.

Three Questions

1. Think of the last concern someone brought you. What did your response—and what happened afterward—give that person reason to expect next time?
2. Which responsibility have you delegated without enough authority, time, information, or support? What needs to change?
3. Where are you helping, and where are you hovering? What could you leave in another person's hands while remaining usefully available?

Chapter 6: Conscious Communication

The Red Light

For years, once a month, a red light came on as I appeared as the money expert on the live show Call for Help, distributed to forty million households in seventy countries. That was the show's potential reach, not a measured audience for my appearances. Live television taught me to get to the point and make the advice usable. Could my mother understand the advice and act on it without translating a paragraph of jargon?

The same question belongs in a team meeting. People need enough context to understand a decision and enough detail to act. A long email can leave out the one fact someone needs. A confident presentation can conceal that no one knows who is responsible for the next step. Imagining that red light coming on can help you notice where your message is wandering.

Make the Message Useful

Speak plainly and prepare. You do not have to improvise to sound human, or share everything you feel to be honest. A few notes can help you explain a difficult decision accurately and keep your own anxiety from taking over the conversation. Leave room to hear what the people affected need to ask.

Before sending an important message, check that it answers the questions relevant to the people receiving it:

- **What is happening?** State the decision, issue, or change in ordinary language.
- **Why does it matter?** Give the reason and the context people need to understand the choice.
- **What does it mean for this person?** Explain the effect on their work, priorities, or commitments.
- **What happens next?** Identify the action, its owner, the timing, and how someone can raise a question or concern.

Distinguish a decision from a proposal. If you are still considering options, say what is open and how you will decide. If the decision is settled, be clear about that while listening to concerns about its consequences. People cannot make useful contributions when they have to guess which conversation they are in.

When a message lands badly, listen to what was understood before defending what you intended. You may need to correct a missing fact, acknowledge a dismissive tone, or change an unreasonable request. Sometimes the message was understood perfectly and the person disagrees. More polished wording will not settle that disagreement; you need to address its substance.

Bring the Problem, and a Proposal When You Can

One of my oldest rules for my teams was to come with the problem and a proposal. I wanted people to move from describing what was broken to helping build an answer, and I wanted the rule to apply to me, too. I still value that impulse. I would put a clear boundary around that rule: encourage a proposal when feasible, and hear the problem when an answer is not yet available.

The invitation needs to be explicit: raise urgent risks, suspected misconduct, ethical concerns, and problems you cannot yet solve. You do not need permission to be concerned, or a finished answer before anyone will listen. Someone may see a problem while lacking the authority, expertise, information, or time to solve it. Naming it is a useful contribution.

For a routine improvement within someone's role, encourage a possible next step when it is feasible. Help the person identify what they know, what they have tried, and where they need a decision or support. If a customer request exposes a staffing problem, for example, the employee should not have to invent capacity the business has not provided.

Sample wording: “Tell me what you are seeing and who may be affected. If you have an idea, I'd like to hear it. If you don't, let's work out who can help and what needs to happen next.”

Apply the same discipline to yourself. Bring a proposed action when you have one, explain its assumptions, and invite improvements. When you do not have an answer, take responsibility for finding the right help and setting the next step. Chapter 5's invitation to speak up must survive the moment you hear something inconvenient.

Difficult Conversations Without the Drama

A conversation you are avoiding can occupy a remarkable amount of mental space while remaining completely absent from your calendar. I watched a leader postpone critical feedback for six months. By the time she delivered it, the situation had reached a termination. Earlier feedback would have given the employee information and time to respond; the delay took away that opportunity.

Hard conversations can feel stressful, especially when you care about the relationship or worry about the response. Give yourself enough time to prepare and choose a setting that protects the person's privacy. Use the emotional regulation practices from Chapter 3 to help you listen and stay responsible for your conduct.

Prepare the facts and the purpose of the conversation. Identify what you observed, the expectation that applied, and the effect on the work or other people. Check whether that expectation was clear and achievable. A performance concern may involve someone's choices, unclear instructions, conflicting priorities, or a shortage of support. Hear their account before deciding which explanation fits.

Sample opening—fictional people and situation: A manager needs to address missed handovers. “The last two Friday handovers went out after the agreed time and did not

include the unresolved customer requests. The person covering the weekend had to reconstruct that information. I want to understand what got in the way and agree on a workable handover. What happened from your side?”

That opening names behavior, impact, and a purpose without assigning a motive. The next part is a conversation. If the employee describes two urgent assignments due at the same time, the manager needs to examine the priorities. If the expectation and capacity were clear, the discussion can address what the employee needs to do differently. Neither explanation should be assumed before the person has spoken.

Allow a pause after you ask. People may need time to think, check facts, or return with a written response. Do not fill every silence with more evidence for your case. If either of you needs a break, agree on when and how to resume. Silence alone does not tell you whether someone agrees.

Be honest about the purpose and status of the meeting. If a decision has already been made, do not stage a consultation. If the conversation is part of a formal performance process, say so and use the appropriate process. Serious concerns about safety or misconduct may require prompt action and help beyond an ordinary feedback conversation.

End with a clear account of the next steps. Record the expectation, what each person will do, what support or changed priority you will provide, and when you will review it. Record any unresolved disagreement, too. Give the other person a chance to correct your account of what was discussed. A commitment to improve needs enough detail for both of you to know what improvement would look like.

Communication Systems That People Can Use

Even a small team can lose a decision between a conversation, a chat thread, and an email. As more people or locations become involved, make it easy to find the current information and the person responsible for it. You do not need an elaborate platform to agree where decisions are recorded, who updates them, and how questions get answered.

- **Repeat what matters, then check understanding.** Revisit priorities when the work requires it, especially when they change. Ask what remains unclear and look for conflicting interpretations in the work. If people are acting on different instructions, resolve the inconsistency; repeating each version more loudly will not help.
- **Choose a usable channel.** Consider urgency, privacy, accessibility, and the person’s circumstances. A conversation can allow immediate questions; a written message can give someone time to process and a record to consult. Offer an appropriate combination. Cameras, public praise, and an immediate spoken response should not be the default test of engagement.

- **Make the response route clear.** For ordinary questions, identify whom people can ask and when to expect an answer. Make room for questions in meetings and for written follow-up. Use the reporting arrangements discussed in Chapter 5 for sensitive or serious concerns, including a route that does not depend on the person whose conduct is in question.

Keep sensitive personal or employment information out of broad updates. If you invite anonymous input, understand whether the channel actually protects anonymity and explain its limits. A public answer can address a general issue without disclosing who raised it or the details of an individual case.

Communicating Through Change and Uncertainty

During change, people need to know what they can act on now. Explain what is known, what is undecided, who is working on the decision, and when the next update will come. State the immediate priorities and any support available. If an update arrives with no new answer, explain what is still being worked through and give the next update time.

Say what remains stable only when you have grounds for that assurance. If roles or workloads may change, acknowledge the uncertainty rather than promising protection you cannot provide. Correct earlier information when it becomes inaccurate and explain what the change means for the people affected. Chapter 10 develops the decisions and responsibilities of crisis leadership; communication needs to stay connected to that practical work.

CASE STUDY: Ursula Burns on Speaking Plainly

Ursula Burns became Xerox's CEO in 2009, the first Black woman to lead a Fortune 500 company.^[6.1] In a 2022 conversation hosted by Chief, she described herself as "natural and caring, but fairly blunt." She spoke about learning to lead in her own voice rather than imitating her predecessor, Anne Mulcahy.^[6.2]

Burns's account of working with Mulcahy also shows why communication needs to travel toward the person with authority. In a 2012 London Business School interview, Burns described being able to alert Mulcahy when she was stuck with a problem or facing a dilemma, while otherwise working independently. She emphasized keeping a superior informed about important matters they would not know to ask about.^[6.3]

A founder can use that lesson in a smaller room: say what you mean, make time to hear the reply, and welcome information you did not know to request. You can hold a clear expectation and still be willing to hear something that changes your view.

One Practice

Choose one real issue you need to raise this week. Before the conversation or message, write down what you know, why it matters, and the action or decision needed. Add a proposal if you have a reasonable one; otherwise identify the help or information needed to move forward. If the issue is urgent, raise it promptly rather than waiting to perfect the wording.

Share it through a suitable channel, invite the other person's account, and agree on the next action, owner, and review time. Afterward, check whether your message gave them enough context to respond. At the review, compare what each of you understood and what actually happened. If a missing fact or unclear request got in the way, improve the message. If the exchange exposed an unreasonable workload or a flaw in the plan, address that as well.

In Worksheets and Resources: [Resource 1](#) Conversation Preparation and Follow Through.

Three Questions

1. What conversation are you avoiding, and what information or opportunity to respond is the other person missing while you wait?
2. Could someone new to your team explain the purpose of your current priority and what they are expected to do? What would help you find out?
3. When someone brings bad news without an answer, what happens next? Which expectation or communication route might be stopping useful information from reaching you?

Chapter 7: Culture by Design

People learn what matters here from the decisions that affect their work.

Building the Company We Wanted to Work In

In 1999 I went to work inside a finance world that often felt like bro culture with a stock ticker. I wanted to build a different kind of company. I worked with an experienced executive team of women, each a decade or more into her career. Much of the financial content I encountered talked down to women or overlooked them. I hired thirty accomplished women finance writers and let them write like they were talking to smart friends. Together they produced 1,000 articles. We were building financial tools for women, and respect for the people we hoped to serve belonged in the way we worked together.

That purpose also gave us a clear basis for partnerships. A student loan partnership with Citibank helped extend our work. Our \$1 million Wells Fargo engagement included helping design and rebuild the bank's entire website, hosting it until it went live, participating in focus groups, and building a financial education center. The center was available to the bank's roughly ten million customers at the time—a potential audience, not a count of people who used it. Those relationships connected the audience we wanted to serve with services and information they could use. Inside the company, the harder test was whether the respect we promised also shaped the experience of the people doing the work.

What Your Everyday Decisions Teach

Culture is the collection of expectations people learn about how work gets done and how people are treated. Some are written down. Others emerge from who gets heard, what gets rewarded, which rules bend, and who carries the consequences. A new employee may read your values on Monday and spend the rest of the week working out how they apply.

These expectations take shape in a five-person business, too. If you praise the person who rescues every late project but overlook the colleague who planned well enough to avoid the emergency, you are sending mixed instructions. If you say people should set boundaries, then give the best assignments to whoever answers at midnight, people have a practical reason to doubt the invitation. A pleasant office cannot settle those contradictions for you.

You can influence these expectations, but you cannot dictate how everyone experiences them. Employees bring different histories, responsibilities, and levels of authority to the same workplace. Ask what happens in practice, including where a well-intended rule makes someone's job harder. Culture becomes more useful to examine when you can point to an actual decision instead of debating whether the company is a wonderful place.

Values That Help You Decide

A value should help when two reasonable priorities compete. Customer service may pull you toward accepting a rush job; care for employees may require a later deadline, a narrower

scope, or additional paid help. Check existing commitments and ask the people who will do the work what is feasible before making the promise. Then explain the choice and take responsibility for its consequences. Sometimes a value costs money. Sometimes it prevents an expensive mistake. Expense alone does not prove sincerity.

Sample: A business says it puts customers first, while rewarding salespeople only for the number of products sold. A leader reviewing that system would look at what the products solve for customers, what happens after a sale, and whether employees can raise a concern about an unsuitable offer. The stated value needs a place in targets, review criteria, and the authority to decline a sale.

Take one of your own stated values and find the last decision it changed. Be specific about the choice, who made it, and who bore the cost. If you cannot find an example, ask where the value should guide the work: in scheduling, spending, hiring, customer promises, or promotion. Decide on one change you can make and explain how you will tell whether it helps. You may discover that the wording needs attention too. People should not have to translate “excellence” into twelve different private guesses.

The Stories People Remember

People also learn through the stories colleagues tell. **Sample:** A new hire hears about someone who challenged an unrealistic deadline and helped change the plan. In another version, the celebrated story is about an employee who missed a family funeral to meet it. These stories invite different conclusions about what it takes to succeed. Before repeating a heroic tale, consider what it asks the next person to sacrifice.

The MsMoney story I described in Chapter 3 outlived the launch. The engineers were prepared to leave over an operations executive’s conduct, and I dismissed her. By then, I had already allowed the problem to reach that point. A version of the story that celebrated only my decisive ending would leave out the lesson I most needed: my attention to her results had delayed my response to how she treated people.

A difficult story does not have to become a permanent identity for your company. Acknowledge what happened, change the relevant practice, and let people judge the change over time. Do not turn someone’s complaint into a public teaching story without their permission. They came to you for help with a problem; they may have no wish to become part of the company folklore.

Inclusion in the Way the Work Is Organized

I spent thirty years being one of the few women in the room. The initiatives mattered less to my experience than who got hired, who could interrupt without consequence, whose ideas received credit, and what happened to people who noticed those patterns out loud. Those are decisions a leader can examine and change.

Look at access to the work that helps people advance. Who gets the useful information, the visible assignment, the training, or the chance to lead? A person who cannot attend an

evening gathering may still be an excellent candidate for responsibility. Someone who needs time to consider a proposal can contribute without competing for the first word. Explain the criteria for opportunities and provide a way to question a decision. Listening is part of inclusion; changing an avoidable barrier is another part.

Illustrative scenario—fictional people and situation: A shop has an owner and six employees. Its weekly schedule changes with little notice, making childcare, study, and other commitments difficult to arrange. The owner has been treating a full schedule as proof that the system works. Employees' accounts suggest a different question: how much rearranging are they doing to make that coverage possible?

Sample plan—trial not yet started: The owner will test two successive weekly schedules, each published at least a week ahead.

- **Starting point:** Check the previous two weeks for late changes and uncovered hours. Ask employees privately about availability and notice they need, without requiring explanations of family circumstances.
- **Change:** The owner will take responsibility for coverage gaps and ask before changing an agreed shift. If additional paid coverage is unaffordable, the owner will reconsider staffing or opening hours instead of quietly relying on the same people to keep rearranging their lives.
- **Review:** At the end of the second scheduled week, compare late changes and uncovered hours with the starting point, examine the costs, and ask employees whether the notice helped. Check whether the plan shifted the burden to the most flexible people. Two weeks can reveal a problem to address; it is too soon to assume the schedule will work in every season.

The point is to examine the rule and its effects. A sympathetic conversation does not solve a schedule that people cannot reasonably work. Nor does a leader get to decide which employee has the most deserving life outside the shop.

Standards That Apply to High Performers

A strong salesperson, engineer, or manager can make a real contribution while also causing harm. Revenue does not answer a report of bullying. Separate the person's results from the conduct being reported, consider the relevant accounts, and act on any immediate need to protect people. Serious misconduct may require prompt protective steps and an appropriate formal process. It should not be held over for a routine coaching conversation.

Where feedback and a chance to improve are appropriate, describe the behavior, the expected change, the support available, and when you will review it. Check what happens to the people affected, including whether anyone is penalized for raising the concern. A promise from the person receiving feedback is only part of that review. Follow through if the conduct continues. A small business may need experienced outside help to handle this fairly.

Employees should not have to absorb ongoing harm while you wait for a more convenient moment.

Carrying the Culture as Responsibility Spreads

Growth makes informal understandings harder to rely on. The same problem can arise when you add a second location, hand work to a new manager, or build a remote team. People need enough shared guidance to make decisions without guessing what you would personally prefer.

- **Make hiring criteria concrete.** Ask about job-relevant conduct, such as how a candidate handled a disagreement or corrected an error. Look for evidence against consistent criteria. “Someone like us” can become an excuse to hire the same backgrounds and personalities again.
- **Show what earns responsibility.** Consider how people achieve results as well as the results themselves. Explain promotion criteria, and check whether everyone has had a fair chance to demonstrate them.
- **Give recurring practices an owner.** Decide who reviews workload, who updates new colleagues, and who checks that a reported problem received a response. Make time for this work instead of assigning it as invisible labor to the most caring person.
- **Keep the account honest.** When you explain a difficult decision, include the tradeoff, what you learned, and what remains unresolved. Invite correction. A culture can hold a mistake without turning it into either a legend or a secret.

CASE STUDY: Hamdi Ulukaya and Sharing Growth at Chobani

Hamdi Ulukaya bought a yogurt factory in upstate New York in 2005 as its former owner was closing it. In his account of building Chobani, he describes a commitment to the workers and the surrounding community. His “anti-CEO playbook” places those relationships close to the purpose of the business.^[7.1]

In 2016, Chobani introduced an employee rewards program that included its roughly two thousand full-time employees, including factory workers. It was a concrete attempt to let employees share in the value they helped create.^[7.2] The terms matter, though. Chobani’s 2021 securities filing describes the 2016 awards as a right to a possible future payment. The amount depended on company value above a set threshold; employees also had to meet conditions about time worked, and a sale or first public share offering had to occur. The units did not themselves make employees direct owners.^[7.3]

The compensation arrangement made the commitment concrete, with conditions that employees needed to understand. Someone deciding what a future benefit means for their own finances needs those details as much as the founder’s intention. The records describe the program; they do not isolate its effect on the company’s performance.

For your own business, consider how people share in the financial benefits of what they build. Fair pay comes first. A transparent bonus or a carefully designed ownership arrangement may provide an additional benefit. Explain who qualifies, how the amount is determined, what conditions apply, and when people can receive it. Check that the promise works as described. Development and greater responsibility can be valuable too, when people want them; they do not substitute for compensation or manageable workloads.

One Practice

This week, examine one gap between a stated value and an everyday decision. Start with a value that affects current work, such as fair treatment, reliable service, or respect for time.

- **Listen for a concrete example.** Invite up to three colleagues, separately, to describe what a new hire would need to know to succeed here. Offer a choice to speak or write, explain who will see the information, and make clear that they can decline. In a very small team, one account can give you something to examine without representing the whole culture. If no one volunteers, start with a recent decision you made and the records available to you.
- **Check the decision behind the story.** Look at a schedule, target, assignment, reward, or response to a problem. Record what happened, which value it supports or strains, and whose experience you have not yet heard. Keep identifying details private when sharing what you learned.
- **Change one thing and review it.** Choose an action within your authority, name who will do it, and set a date after the next relevant work cycle to review its effects with the people affected. Explain what changed and what remains constrained. If the problem needs a more senior decision, take it to that person and set a date to follow up.

In Worksheets and Resources: [Resource 3](#) Small Change and Review; [Resource 5](#) Decision Record.

Three Questions

1. Which recent decision best shows what your team is rewarded for, and how does it compare with your stated values?
2. Who has less access to information, useful assignments, or predictable working arrangements, and what part of that difference can you change?
3. What conduct are you finding reasons to excuse, and what do you need to establish or act on before you can address it fairly?

Chapter 8: Strategic Vision That Works

I watched the gap for three years before I built MsMoney. Patience mattered; so did deciding when to move.

The Count

On March 5, 1996, I walked into Moscone Center in San Francisco for the Netscape Internet Developer Conference, my first tech conference, with my own web company already running. I remember a hall of roughly three thousand developers, buzzing about the possibilities of the internet. At some point I stopped listening to the buzz and started counting the women I could see. I got to about thirty. That count stayed with me.^[8.1]

I did not leave that hall with a business plan. I left with a question about who was being considered as this new world took shape. In the months that followed, I looked at what the internet offered women about money. Much of what I found focused on beating the market. I saw little that spoke to the woman managing a household's finances, trying to make good decisions without being talked down to. I bought the domain msmoney.com that year. Then I waited another three years before starting MsMoney.

I kept watching as the internet grew. By September 1999, I was ready to found the company. Capital from investors helped us turn the idea into a site. The conference had sharpened my attention to a possible gap; the business still had to earn its place by serving people. My impression of that room could give me a reason to investigate. It could not tell me how many women would want our service, what they would use, or how the business would support itself.

People imagine vision arriving as lightning: the founder in the shower, the billion-dollar epiphany. In thirty years of building companies and watching others get built, I have almost never seen lightning. I have seen weather. An observation returns. A conversation gives it more shape. Eventually there is enough to consider doing something about it. Patience is the ingredient nobody wants to buy. It also needs a purpose: learning something that helps you decide when, how, and whether to act.

A Direction People Can Use

A vision describes the future you want the work to help create. Strategy makes choices about how to pursue it with the people, time, and money available. Both need ordinary language. "The premier provider of innovative solutions through excellence and commitment" can sound impressive while leaving a team no better equipped to choose its next project.

Give people a clear account of whom you intend to serve, what you want to improve for them, and what you will concentrate on next. Then explain what that focus excludes for now.

A team needs to understand the direction well enough to use it, including when a promising opportunity would pull resources away from the work already chosen.

At MsMoney, our vision was practically written for grandmothers, mothers, and daughters: one place for a woman's whole financial life, where she could act as the chief financial officer of her household with confidence and without embarrassment. That purpose helped me explain the audience we were building for and the kinds of content and partnerships that belonged in the business. Women's circumstances and goals differ; the aim was to make financial information and tools approachable enough to support their own decisions.

You do not need a global ambition for this to matter. A local business can aim to make a difficult service easier to understand and more dependable. A team inside a larger organization can choose to make a process less burdensome for the people using it. The useful test is whether that direction changes a real choice: the work you accept, the promise you make, the time you protect, or the project you postpone.

What Other People Are Agreeing to Support

Before MsMoney had a product, I landed CarsDirect as our exclusive car-buying platform. We had a business plan, a domain name, and a vision for serving women. We did not have user numbers to present. I could explain the connection between the audience we intended to build and the service CarsDirect could provide. The partnership gave us a service and revenue that could help us build the site.

That agreement mattered, but a partner's willingness to participate did not prove that the audience would arrive. When people put capital, working time, or a career decision behind your vision, they need to understand what is established and what remains a bet.

Enthusiasm is easier to assess when it comes with a specific commitment, realistic boundaries, and a way to revisit the plan.

With your team, explain the next priority, who is responsible for the decision, and what capacity it requires. Name the work you are stopping or delaying to make room. Give people a way to raise a conflict between the new direction and existing commitments. They can understand the purpose and still see a delivery problem you have missed. Their caution may help you make the strategy possible.

Holding a Direction While Testing the Plan

A quiet launch or a rejected pitch can be discouraging. It can also contain useful evidence. Start by asking what the response actually tells you. An investor may dislike the timing, see a weak business model, question the team's ability to deliver, or simply be looking for a different kind of investment. A customer may recognize the problem but prefer an existing solution, find the price too high, or not care enough to change habits. Some objections concern your explanation. Others concern the proposal itself.

The continued existence of an unmet need is a reason to keep investigating. It does not establish that your business is the right way to meet it. Test the particular offer: whether

people want it enough to act, whether you can deliver it reliably, whether the economics work, and what it asks of the people doing the work. For an internal improvement, look at the time, cost, and effort it saves against what it requires. A useful purpose can survive a decision to change or stop a particular project.

Before committing more resources, decide what you need to learn next, what you can afford to risk, and when you will review the evidence. Include a condition that would make you pause, change direction, or stop. This gives persistence some discipline. It also gives your team an answer when they ask how long the current experiment will continue.

Illustrative scenario—fictional people and situation: A design studio has an owner and four designers. Several prospective clients have asked for faster delivery. The owner is considering a promise to turn around any design job in twenty-four hours. The designers point out that they are already committed to client deadlines. The request may reveal a need, but the proposed promise is too broad for the capacity available.

Sample decision record—proposed trial, results pending: The owner narrows the idea to a paid rush service for a one-page event flyer using client-supplied text and images, with one revision included. The first draft would be delivered within one business day after the agreed inputs are complete and the studio accepts the job; revision timing would be agreed before acceptance. Before the customer interviews, the owner will estimate the staff time and other costs and set a provisional fee to discuss with prospects.

- **Learn first:** Ask recent prospects what deadline they needed, what they used instead, and whether the proposed scope and price would have suited them. Treat interest as a reason to consider a trial; paid orders would provide different evidence.
- **Set limits:** If the interviews support a trial, the owner will authorize at most one rush job a week for two weeks, with a ceiling of four staff hours per job, including customer communication and review. Before accepting a job, the owner will confirm the fee, cost limit, and available capacity with the designers. The trial will wait if it depends on unplanned overtime or displacing existing commitments.
- **Decide after the trial:** Review paid orders, delivery time, rework, costs, and the effect on existing work. Keep unfinished jobs pending and set a later check for their delivery, revisions, and final costs. Change or stop the offer if the hours or cost limit is exceeded, the promised deadline cannot be met, or existing work suffers. Even if two jobs go well, the studio still needs more evidence before extending the promise to other kinds of work.

The team now has a decision it can examine, with boundaries around the work it is being asked to do. The studio can keep its aim of making design more useful to small businesses while learning which services it can responsibly provide.

CASE STUDY: Melanie Perkins and the Work Behind the Hundred Nos

While teaching design software in Perth, Melanie Perkins noticed how much effort students spent learning tools. She imagined a simpler, online, collaborative way to design. With Cliff

Obrecht, she first applied that idea to school yearbooks through Fusion Books, working from her mother's living room. In her account, serving paying school customers taught them how to build a product, market it, and respond to customers' needs.^[8.2]

The larger idea still proved difficult to fund. Canva's account describes more than one hundred investor rejections. Building the technical team was a substantive challenge; Cameron Adams later joined Perkins and Obrecht as a cofounder.^[8.3] Perkins also learned to kitesurf to take part in a gathering of entrepreneurs and investors. I count that among the great networking commitments in startup history. Her account makes clear that persistence involved finding people, learning the business, and developing the offer as well as revising the pitch.^[8.2]

Canva announced its launch on August 26, 2013, beginning with limited access in the United States and Australia.^[8.4] In 2021, Perkins and Obrecht pledged the vast majority of their equity toward philanthropic purposes.^[8.5] Those later milestones can make the early decisions look more certain than they were. The useful feature of this story is the work done between the initial observation and the larger platform: a narrower business with customers, repeated attempts to assemble the team, and a product brought into use.

A hundred refusals are not a recipe. Another founder could persist just as fiercely and run out of money, or discover that the proposed business does not work. What I take from Perkins's account is a reason to hold an ambition alongside evidence and the practical work of building. You can keep caring about the problem while changing what you are prepared to promise.

One Practice

Keep a gap log for one week. When you notice a repeated frustration or something that seems missing, write down what happened, who was affected, and how they handled it. Separate what you observed from your explanation of it. Raise urgent problems as they arise; the log is for questions you can take time to investigate.

- **Choose one gap to understand.** At the end of the week, select an issue that recurred or had a significant consequence. Ask someone affected to describe a recent example and what they currently do about it. Listen for a reason your first interpretation may be incomplete.
- **State a possible direction.** Write two or three sentences about whom you want to help, what you want to improve, and one thing you would concentrate on first. Add an alternative explanation or existing solution you need to consider. You are forming a proposal, not making a promise to build it.
- **Set the next learning step.** Choose a small conversation, observation, or authorized trial that could change your mind. Name the owner, time and cost limit, and a review date. Record what evidence would justify continuing, changing, or stopping, including the effect on existing work. At that review, compare what you learned with what you expected and make the next decision explicitly.

In Worksheets and Resources: [Resource 3](#) Small Change and Review.

Three Questions

1. What evidence supports the need you see, and what separate evidence supports your proposed way of meeting it?
2. Which opportunity or existing commitment will you postpone to give your chosen direction enough capacity?
3. What would make you revise or stop the current plan, and when will you review that evidence with the people doing the work?

Chapter 9: Change and Innovation Leadership

Twelve Treatments and a Polite Pass

In 2006 I wrote twelve television treatments—outlines of proposed shows—for what I thought of as positive reality television. I wanted to show people building something up and growing through their experiences. There was plenty of humiliation on television already. I believed an audience would want to watch humans grow without having to watch somebody get voted off the island.

So I founded Thrive Media and produced five sample shows. They had names like *Harmony*, *Peaceful Planet*, and *The Charmed Life*. I wanted to find out whether the idea could breathe outside my own head, and the samples gave prospective buyers something to see.

I pitched Sony, MTV, Disney, and Kaiser. There were encouraging meetings, but the financing I needed did not come together. By then, I had made a substantial commitment to creating the shows before establishing how production would be financed and how they would reach viewers. The treatments had cost more than paper. My time and the work of making five samples were real investments.

In 2007 I sold Thrive Media's intellectual property to Viacom, profitably. That was a real win, and the negotiation belongs to Chapter 12. It was also a different outcome from the television business I had been trying to build. I cannot turn the sale into evidence that every earlier decision was sound.

Being early and being wrong can feel very similar from the inside. The phone goes quiet, and at three in the morning you can find yourself inventorying everything other people failed to see. With Thrive Media, the more useful question is what I could have established before committing so much work. Today I would start with a smaller batch and a clearer test of financing and distribution. That leaves room for belief in the idea while giving the evidence a chance to change the plan.

From a Direction to a Change People Can Make

Chapter 8 asked whether a direction deserves your commitment. Once you decide to pursue it, another kind of work begins. Somebody has to change a schedule, learn a process, serve a customer differently, or let go of work they know how to do. A persuasive presentation does not tell them how to manage Tuesday.

Innovation and change share a need to learn as you go, but they bring different demands. Testing a new service may reveal whether customers will buy it. Introducing that service also changes assignments, training, costs, and promises to existing customers. An idea can attract buyers and still be badly introduced. A new internal process can be sensible and still fail because nobody has time to learn it.

Begin by describing the change in terms of work. Explain the problem you are trying to address, what people will do differently, and what must continue to work while they learn.

Name the person responsible for the transition and the decisions that person can make. In a modest team, this may be a conversation and a page of notes. It still needs an owner.

Talk with the people who will use the new process before treating the design as settled. Ask where work is likely to pile up, what customers depend on, and what the proposed plan overlooks. Someone who points out a missing handoff may be protecting the change from a very predictable failure. They do not need to arrive with a complete replacement plan to make that observation useful.

Some concerns are about more than implementation. A change may affect status, income, working hours, or whether a role will exist. Tell people what has been decided and what remains open. If a decision is yours to make, explain it and take responsibility for its effects. Calling a meeting a consultation creates a reasonable expectation that something can still change.

Give the Transition Enough Room

A bounded trial lets you learn about the new way of working without committing the whole organization at once. Choose a limited piece of work, a period long enough to see it through, and the evidence you will review. Include staff time, training, temporary support, and any duplicate work in the cost. A trial that looks cheap because people absorb it after hours is hiding part of its price.

Agree on what would make you pause or change course. Protect obligations that cannot wait for your experiment: a promised delivery, an essential service, a person's safety. Where a fallback is feasible, say who can activate it and how unfinished work will be handled. Avoid leaving people to maintain two complete systems indefinitely while the leader waits to feel certain.

Illustrative scenario—fictional people and situation. Nora owns a repair business and employs three technicians and an office coordinator, Ellis. They are considering a shared scheduling process because changes to routine appointments are being missed. Nora proposes a one-week trial involving only new routine bookings for one technician, Jo. Existing appointments and urgent repairs stay with the current process.

- **Prepare the work.** Nora, Ellis, and Jo will walk through a booking, a change, and a cancellation during one paid training hour. Nora will reduce Jo's appointment slots and take over Ellis's routine stock-ordering work during the trial to allow both people time to learn. Ellis will confirm Jo's bookings, checking both schedules before reserving any time. Nora will cover that check when Ellis is unavailable. Each appointment will be recorded in only one schedule, according to the trial's boundary.
- **Set responsibility and a fallback.** Ellis will own the trial schedule. If a change cannot be recorded or a customer's appointment is at risk, Ellis can pause new trial bookings and tell Nora. They will account for every open trial appointment before returning those bookings to the existing process.

- **Review what happened.** At the end of the week, the three will review missed or corrected bookings, time spent scheduling, customer problems, and the work Jo and Ellis had to add. Nora will set aside time for a later review of appointments that have not yet happened, with Ellis responsible for tracking them through completion. Nora will hear both accounts and decide whether to revise, extend, or stop the trial before involving another technician.

The point is to see the work closely enough to make the next decision. A week without a missed booking would be encouraging; it would not establish that the process could handle the entire business. Jo or Ellis might also uncover a problem that Nora's original measure missed.

Moving Through the Middle

During a transition, people may be carrying both the old responsibilities and the effort of learning something new. Check that load directly. Which tasks will stop, which deadlines will move, and who can help? Encouraging words have their place. So does removing three items from somebody's list.

You can be honest about uncertainty without leaving people directionless. Report what is working, what is still difficult, what you have decided, and when you will review it again. Give people a way to raise problems privately or in writing as well as in a meeting. You cannot decide whether they trust you. You can make your account accurate, keep commitments, and respond when the work contradicts the plan.

Check adoption in the work itself. Attendance at training tells you who attended. It does not tell you whether someone can use the process under pressure, whether the new work fits the available time, or whether customers are better served. Watch a task, ask people to explain where they get stuck, and look at rework and delays. Agree on useful measures before the trial so a flattering result does not become your only measure afterward.

When a trial disappoints, several explanations may fit. The need may be different from what you assumed; the process, timing, resources, or explanation may be inadequate. Some ideas are not worth continuing. Use the evidence to narrow the possibilities, then decide whether another test would teach enough to justify its cost. A leader can make it easier to bring forward an unproven idea by showing that a well-run test may end with a decision to stop.

CASE STUDY: Anne Mulcahy and the Work of Change

Anne Mulcahy became CEO of Xerox in 2001 as the company struggled with severe financial problems.^[9.1] In a 2005 Wharton lecture and interview, she described listening to employees and customers, simplifying responsibilities, and confronting changes that had looked better on paper than they worked in practice.

One earlier reorganization had disrupted sales relationships. Mulcahy acknowledged that the company had underestimated the cost to continuity and customer trust, while people in the field had not spoken up. Other reorganizations had made accountability so diffuse that a

business decision required a crowd of people. She described choosing a clearer structure, even when it was less fashionable as an organizational design.^[9.2]

The turnaround also involved financing, cost reductions, and job losses. Xerox reported a return to full-year profitability in 2002.^[9.3] The lesson I take from Mulcahy's account concerns the work: make decision authority clear, protect what customers depend on, and listen to the people who must carry out the change.

One Practice

Choose one change you are considering or have recently introduced. On one page, write the problem it should address, the work that will change, the person responsible, and the obligations that must keep working during the transition. Ask someone who will do the work to review the page and identify a missing cost, dependency, or concern.

Then define a manageable trial: its scope, the time and support it needs, what would prompt a pause, and a review date. Decide what existing work will be reduced to make room. Run the trial when those conditions are in place. At the review, compare your expectations with what happened, including the effect on people's workload, and record the next decision and who will carry it out.

In Worksheets and Resources: [Resource 3](#) Small Change and Review.

Three Questions

1. What does your proposed change ask people to give up or learn, and how have you checked that the time and support are available?
2. What must keep working during the transition, and who has authority to pause the change if that is at risk?
3. What evidence would lead you to revise or stop this change, even after you have publicly supported it?

Chapter 10: Crisis Leadership and Resilience

The Year of Obituaries

I founded MsMoney in September 1999 and raised capital from investors. The company was about six months old when the market turned in March 2000.^[10.1] Over our first year, I hired a hundred employees and contractors. We were building a company while the conditions around us were changing fast.

The dot-com crash did not arrive as one bad day. It arrived as a subscription. I kept reading about companies closing, including companies with far more funding than ours. I read their obituaries in the trade press, checking for names I knew, and I knew plenty. Bigger teams and louder launches had not protected them.

MsMoney's eleven-year history included the dot-com collapse and the 2008 financial crisis. I want to be careful with the lesson. Surviving does not prove that you had the best product or that your leadership was better than everyone else's. Luck, timing, customers, and the resources available to a business matter. What I can describe is the work we did from inside our own uncertainty.

Face the Facts, Then Organize the Response

Hope is a beautiful thing to carry and a terrible thing to budget. The funding environment might improve, a customer might sign, and a market might recover. The question during a crisis is whether your company can meet its obligations while you wait, and what you need to change if it cannot.

In a crash I lived by the least glamorous numbers a company owns: the cash available, what was coming in, what had to go out, and how long we could meet our obligations. That estimate does not care about your press coverage. When leaders tell me their crisis instinct is to project confidence, I tell them my crisis instinct was to project arithmetic. My team could check the numbers behind the confidence.

The arithmetic also pushed us toward money we could earn. When the crash changed our prospects for raising the advertising capital we had planned on, our consulting arm helped carry MsMoney. We sold marketing, design, and technology services to financial institutions. Those customer relationships brought in millions in fees. They gave us another source of income when the financing we had hoped for was uncertain.

The first priority depends on the crisis. If someone faces immediate danger, protect people and get the appropriate emergency or specialist help. In other situations, the urgent issue may be a lost supplier, a failed system, a customer commitment, or a sudden gap in cash. Name the immediate harm you need to limit before trying to solve every consequence at once.

Give one person responsibility for coordinating the response, with clear authority and a backup. In a small business that may be you, supported by two people with distinct jobs.

Establish what is known, what needs checking, and which decisions cannot wait. Give each urgent action an owner and a time to report back. A shared page that gets updated is more useful than five people privately assembling different versions of the crisis.

For a cash problem, a monthly average is only a starting point. Put expected receipts and payments against the dates they are due. Separate confirmed money from money you hope will arrive. Review payroll and other obligations, essential suppliers, and commitments to customers with the people responsible for the accounts. Identify the decisions that require financial or legal advice before you promise terms you cannot keep.

Make Decisions Without Pretending to Know the Future

Some options expire while you deliberate. A supplier may have only one available production slot; a customer may be able to accept a change today that would cause serious trouble tomorrow. Ask what a delay would cost and what evidence you can obtain in the time available. Then decide at the level of urgency the situation requires.

Acting early does not require making every irreversible decision at once. You may be able to pause optional spending while confirming the size of a shortfall. You may need to make a larger change when the evidence is clear. Repeatedly announcing that a painful decision is the last one, without a sound basis for saying so, adds another burden to people already dealing with it. Explain what you have decided, why, and what could lead to another decision.

People need information they can use: what happened, what it changes for their work, what you know and do not know, and when they will hear from you again. Choose a regular update time and keep it even when some answers remain open. Contact people directly about changes to their own jobs or pay through an appropriate private process. Share a written account so essential information does not depend on being in the room, hearing every word, or remembering it under stress.

Your manner can help people concentrate, but you do not set everyone's emotional state. They may be frightened, angry, distracted, or coping with pressures you cannot see. Ask what they need to do the work safely and realistically. Do not make apparent calm, or a willingness to work indefinitely, a test of loyalty.

A Response People Can Use

Illustrative scenario—fictional people and situation. Amira owns a print shop with four employees. At 9 a.m. on Tuesday, the main production printer stops working. Three customer orders are due on Wednesday. No one is hurt. The cause of the failure and the repair time are unknown. Amira writes this initial response plan for the team.

- **Known and unknown.** The printer is unavailable, and the three orders remain due. A qualified technician must assess the equipment before it is used again. The repair time, outside printing capacity, and cost still need checking. No revised delivery date has been promised.

- **Owners and first actions.** Amira coordinates the response. By 10:30 a.m., Luis, the production lead, will report what he has learned about repair timing and an outside printer's capacity and quote. Priya, who handles customer orders, will report each customer's essential deadline and any restrictions on outside production. The external bookkeeper will check cash and upcoming obligations with Amira before the 11 a.m. decision.
- **Decision and limits.** At 11 a.m., Amira will decide whether to arrange outside production, seek an agreed deadline change, or develop another option from the facts available. She will consider up to \$1,200 for outside work only after confirming that it is affordable and meets the customers' requirements. Luis is the backup coordinator. If Amira is unavailable, he may approve a plan within those same limits after the cash and customer checks; a larger commitment requires Amira's approval.
- **Next update.** Priya will update the three customers by 11:30 a.m., including those whose orders still lack a confirmed plan. Amira will update the team at the same time, assigning revised work and a person to cover each customer commitment. Unless all three orders have confirmed plans, the next update will be at 3 p.m. Staff will have a clear end to their scheduled workday and a named handoff for any open issue.
- **Review and recovery.** Amira will check each order against its agreed commitment and assign any remaining customer problem for resolution. At the review, the team will examine missed deadlines, extra costs, workload, and the cause of the disruption, then decide whether a backup production arrangement is worth maintaining. Follow-up actions will have owners and dates.

This first page does not need to solve the entire disruption. It needs to make the next few hours usable. If the technician's estimate changes or the outside quote exceeds the limit, the team knows who must decide and when customers will hear what happens next.

Resilience Needs Capacity

By 2008, MsMoney was a different company from the young business that met the first crash. Relationships and partnerships mattered. So did a culture in which difficult information could reach me and a team with experience of working through uncertainty together. Those were resources we could draw on; they were no guarantee that the next crisis would be manageable.

Build that capacity in ordinary weeks. Make sure essential work has someone who can cover it, records can be found by the people authorized to use them, and important customer or supplier knowledge is not held by only one person. Examine the dependencies most likely to stop your work. A backup arrangement you have never checked may be less useful than it appears on the plan.

Chapter 4 addressed steadiness in the moment. A prolonged crisis also needs coverage, rest, and decisions about what will stop. Set shifts or handoffs where extended coverage is necessary. Revisit priorities as the situation changes, and bring in appropriate support when

the team cannot safely carry the load. Your own absence should be possible too. Being the only person who can authorize every next step is a fragile way to run a long emergency.

When the immediate danger or disruption has passed, close the response deliberately.

Acknowledge the costs to customers and employees, including unfinished work or harm that still needs attention. Thank the people involved without turning exhaustion into the achievement you celebrate. Review what helped, what made the response harder, and what you will change. Give the changes owners and dates while the experience is still fresh.

CASE STUDY: Arne Sorenson's March 2020 Message

In March 2020, Marriott CEO Arne Sorenson recorded a video for employees while receiving treatment for pancreatic cancer. He acknowledged his changed appearance and described the scale of the damage COVID-19 was doing to the business. His emotion was visible as he spoke about the people affected. The message combined candor about a severe crisis with hope for travel's eventual return.^[10.2]

The communication sat alongside consequential operating decisions. Marriott's March 18 update described hotel closures, temporary leave, shorter working weeks, staff reductions, deferred spending, and steps to preserve liquidity. The company subsequently reported that, from April through the end of 2020, Sorenson's base salary was reduced to zero apart from deductions needed to maintain benefits, while other named executives' base salaries were reduced by half. These were base-salary reductions, not the elimination of all compensation.

^[10.3]

Sorenson died on February 15, 2021.^[10.3] His message remains useful to study, but it cannot establish that one video secured the company's survival. Nor does it create an obligation for leaders to make their illness public. What I take from it is the connection between humanity and responsibility: tell people how serious the situation is, explain the decisions affecting them, and give them a way to understand what happens next. Hope belongs alongside that work; it cannot supply the operating plan.

One Practice

Set aside thirty minutes with one or two people who know your operations. Choose a plausible disruption to your work, such as a key supplier becoming unavailable or an expected payment arriving late. Imagine that it has happened this morning and write a one-page first response.

- Record the immediate harm to limit, the first facts to verify, and the work or obligations that must be protected.
- Name a response owner and a backup. Assign the first two actions, the decisions that need authorization, and the times by which you need an answer.
- Draft the first message for the people affected, with what is known, what remains uncertain, and the next update time. Add a handoff so the response does not depend on one person being continuously available.

Read the page together. Where have you assumed access, money, expertise, or capacity you may not have? Choose one gap to address now, give it an owner and a date, and check that it has been addressed. You are meeting your crisis self on a calm day, when there is still room to help her prepare.

In Worksheets and Resources: [Resource 4](#) First Crisis Response.

Three Questions

1. Which assumption about cash, capacity, or a critical partner would most change your next decision if it proved wrong?
2. What does each affected person need to know or do next, and who is responsible for making that clear?
3. If this disruption lasted several weeks, what would you stop, and who would provide coverage so that people—including you—could rest?

Chapter 11: Ethics and Stakeholder Leadership

A Place Among the Finalists

In 2010, Bolsa Cheia became one of fifteen finalists in the Cartier Women's Initiative Awards. I co-founded the Brazilian spinoff of MsMoney with a local Brazilian partner and wrote its business plan. We wanted to help women manage their money with greater knowledge and confidence, bringing financial education into the decisions they were already making for themselves and their families. ^[11.1]

That recognition mattered to me because it took seriously a group of customers I cared about. It did not establish that our plan would succeed, or that serving an overlooked market was automatically a better business. It gave the work an audience. We still had to understand what women needed and build something useful enough to sustain.

Choosing whom to serve is one expression of your values. The harder test comes when keeping a promise threatens revenue, protecting one person burdens others, or a company's immediate needs collide with the people it hopes to help. Those are decisions a small-business owner can face before lunch, without an ethics committee or a free afternoon.

When Your Values Disagree

Chapter 7 examined what your everyday decisions teach people about your values. Here we need to slow down around a particular choice and ask what makes it defensible. Some ethical problems involve competing goods: loyalty to a colleague and fairness to the team, or keeping jobs today and protecting the business for next year. Others involve pressure to excuse something plainly wrong. Calling deception a tradeoff does not make it one.

Even a real conflict may contain more room than it first appears. Honesty does not require delivering painful news in public. Kindness can shape the timing, privacy, and support around a conversation while the other person still receives information they need. Before choosing which value must lose, examine the choices you have left off the table.

I have trained my intuition for decades with the attention other executives give their golf swing. I know the feeling of a decision that looks fine on paper and refuses to sit comfortably in my chest. I want to understand that feeling before I overrule it with a spreadsheet.

The feeling is a reason to investigate. It cannot establish what another person intends, settle a disputed fact, or give me permission to override someone's rights. I ask what, specifically, is bothering me, what evidence might support that concern, and who could help me see what I have missed. Intuition belongs in the inquiry alongside other people's knowledge.

Work Through the Decision

For a consequential choice, make a short written record. A page is usually enough to expose the gaps that a confident conversation can conceal. If there is immediate danger, take the protective action first; use the record to support the next decisions rather than delay them.

- **State the decision and the facts.** What must be decided, by when, and by whom? Separate what you know from estimates and assumptions. Identify the missing information most likely to change the choice and whether you can obtain it before the deadline. Name any personal interest you have in the result, including a bonus, a friendship, or a desire to avoid embarrassment.
- **Identify who is affected.** Include the people doing the work, customers, suppliers, owners, and others who may carry a cost without attending the meeting. Ask whose account is missing. Offer a practical way to contribute privately or in writing, and explain how the information will be used.
- **Establish the constraints.** Check relevant obligations, safety requirements, rights, and promises before treating everything as negotiable. Where a legal, technical, or employment issue exceeds your knowledge, bring in someone qualified to advise you. The person with the budget does not necessarily have authority to waive the constraint.
- **Compare the available choices.** Include a narrower action, a pause, or declining the work where those are possible. Set out the likely benefits, costs, uncertainties, who bears them, and how difficult each choice would be to reverse. Look for an option that reduces harm without quietly transferring it to someone with less power.
- **Decide, explain, and review.** Record the choice, the main reason, the unresolved disagreement, and the person responsible for the next action. Tell affected people what they need to know, protect private information, and set a time to examine the consequences. Explain what new information would make you change course.

Consultation is not a request for employees to approve their own disadvantage. Ask for their knowledge and preferences without making agreement a test of loyalty. If you have a personal stake in the outcome, disclose it to the appropriate people and arrange an independent check of the decision. You may still have to make a choice others oppose. They deserve an honest account of your reasoning and a workable route to raise an error or an unexpected consequence.

Sample: A Client Report with a Material Error

Illustrative scenario—fictional people and situation. A consultancy has one owner and four employees. On Wednesday afternoon, an analyst finds that a report sent to a client leaves out an \$8,000 implementation fee shown in a supplier's quote. The report gives a project cost of \$32,000; the quoted cost including the missing fee is \$40,000. The client intends to discuss the project on Thursday morning. A contract-renewal conversation with the consultancy is scheduled for Friday.

Sample decision record

- **Decision and authority:** The owner must decide how to notify the client and correct the report today. The client controls its own project decision. The analyst has brought the mistake forward and is not responsible for negotiating the business consequences.

- **What is known and what needs checking:** The supplier quote contains the omitted fee. A second colleague will check the calculation and whether the error affects other recommendations. We do not yet know whether the client has shared the report or acted on it.
- **People and competing interests:** The client needs accurate information before committing money. The consultancy wants to retain the work. Employees need time to make a reliable correction without being blamed for reporting a problem or expected to absorb extra hours.
- **Constraint and alternatives:** Leaving the client to rely on a figure we know is materially wrong is unacceptable. Waiting for a perfect replacement could allow that to happen. Notify the client now, explain the known error and the remaining check, and ask whether the report has already been used or circulated.
- **Chosen action and reason:** The owner will contact the client this afternoon, take responsibility for the report, and ask it to hold decisions based on the affected estimate. If the report has already been used, the owner will assess any urgent corrective action with the client now. After confirming the working time needed for correction and review, the owner will propose a delivery time and seek the client's agreement. The client may need to postpone its discussion or make another arrangement.
- **Time and cost:** Reserve two working hours for the analyst and two for an independent colleague to correct and review the report. The owner will defer internal proposal research to create that capacity; other client deadlines remain commitments. The consultancy absorbs the correction time.
- **Follow-through:** The owner will send the corrected version, identify the changed figure, and clearly mark the earlier estimate as superseded. The owner will confirm who needs the correction, including anyone who received the first report. On Friday, the owner will check for any remaining decision or cost affected by the error, then review how the fee was missed and what checking step needs to change. The renewal decision remains the client's.

The choice carries a commercial risk. Hiding the error would leave the client carrying a risk it had no opportunity to judge. A useful record makes that difference visible and assigns the repair to the people who can actually do it.

Who Counts

A stakeholder is a person or group affected by the business or able to affect its work. Employees, customers, suppliers, communities, and investors have different interests and different kinds of power. Stakeholder leadership means considering those interests deliberately, including effects that do not arrive as an invoice.

In 2021 I co-founded OM Impact Fund with the philanthropist and wealth manager Shirin Hedayat. People, Planet, Profits expresses the order of attention I want to bring to that work.

Profit belongs on the list; a business needs resources to keep serving people. Our interest in education, climate, health, and financial tools for underserved people reflects the wider contribution we want capital to make.

Those principles have cost us deals. Each choice still needs examination of its facts and effects, including how a company earns its money, what evidence supports its claims, and who may be paying a cost the financial forecast leaves out. I do not want the value of an ethical choice to depend on a promise that it will eventually be the most profitable one.

Ajay Banga described a “decency quotient” as part of his approach to leadership at Mastercard. In April 2020, while he was CEO, the company reported that it had reached its 2015 goal of bringing 500 million people previously excluded from formal financial services into the financial system, through programs with partners. It then set a target of one billion by 2025. Those were company-reported access figures and a new commitment, not proof of lasting financial security for every person reached. The useful move was to connect an intention to a defined effort that could be examined. ^[11.2]

CASE STUDY: Paul Polman and the Long-Term Commitment

At the beginning of 2009, during the financial crisis, Unilever stopped giving earnings guidance under its new CEO, Paul Polman. Its annual report paired that change with attention to sales volumes, cash flow, and margins. Taking a longer view did not remove the need to run the business. It changed the expectations surrounding that work. ^[11.3]

The Unilever Sustainable Living Plan, launched in 2010, set out ambitions to grow sales while reducing the environmental impact of making and using its products. It included a goal of helping more than a billion people improve their health and well-being by 2020. These were commitments to pursue, not accomplishments at the moment they were announced. ^[11.3]

There were encouraging business results and unfinished work. Unilever reported that its Sustainable Living Brands grew 46 percent faster than the rest of the business in 2017 and supplied 70 percent of its growth that year. That comparison does not isolate sustainability as the cause. The company’s March 2021 review also acknowledged missed targets. For six product categories in seven water-scarce countries, its reported water impact per consumer use was unchanged from 2010, despite a goal to halve it by 2020. Progress deserved examination at the level of each promise. ^[11.4]

In February 2017, Kraft Heinz proposed a combination valuing Unilever’s equity at approximately \$143 billion. Unilever rejected the proposal on financial and strategic grounds. Two days after that rejection became public, a joint statement announced that Kraft Heinz had agreed to withdraw. Those records support a consequential decision about the company’s future; they cannot tell us what shareholders or other stakeholders would have received under a deal that never happened. ^[11.5]

Make a long-term commitment specific enough to challenge: explain what the company is protecting, what resources it is committing, and where it is falling short. A worthwhile

purpose can guide difficult choices while the results remain mixed. That is a stronger basis for accountability than expecting the balance sheet to certify our virtue.

One Practice

Choose one live decision this week. List the people and groups likely to be affected, including those who may bear a cost later, then mark who has supplied information and whose view is missing. Invite one affected person to contribute through a channel they can reasonably use; make clear what is open to change and who will decide. They may decline. If direct input is not possible, record that limit instead of assuming you know their view.

Use the decision record above to work through the facts, constraints, alternatives, costs, and next action. Note what the additional input changed, or why you could not follow the person's preferred course. After deciding, tell the people who need to act what was chosen and why. Set a review date suited to the decision, and check both what happened and whether the people bearing the cost have something you need to hear. Correct the action or the explanation if the evidence calls for it.

In Worksheets and Resources: [Resource 5](#) Decision Record.

Three Questions

1. Which part of a difficult decision is a true tradeoff, and which obligation or right should not have been put up for negotiation?
2. Who will bear a cost of your preferred choice, and what information or perspective have they had a fair chance to contribute?
3. What assumption, consequence, or new evidence would make you reconsider the decision, and who will check it with you?

Chapter 12: Power, Influence, and Politics

The Parking Lot

The best deal of my career closed in a preschool parking lot. It was 2007, I was waiting for my son, and on the other end of the phone was Viacom, agreeing at last to a price ten times its opening offer for Thrive Media's intellectual property. When the call ended, I put the phone away and went in to get my boy. That afternoon, power looked like a mother arriving on time for pickup.

It took a year to get to that parking lot. When Viacom first approached me about the intellectual property, I thought the offer was far too low. I countered at twenty times that amount. There was a great deal of waiting during the yearlong negotiation. At one point, when the conversation returned to the original offer, I hung up the phone. On Viacom. The sale eventually closed at ten times where they had started.

Chapter 9 describes the work I had hoped to produce through Thrive Media and the financing I had not secured. Selling the intellectual property was a real win and a different outcome from making those shows. The distinction matters here too: Viacom bought the IP, not the entire company.

Know Your Options and Your Limits

I could afford to leave that particular offer on the table. That mattered more than the drama of hanging up. I was willing to wait, and I did not accept the buyer's opening price as the value of the work. I cannot tell you that silence alone produced the final price or what pressure the people at Viacom felt. I can tell you that giving myself time helped me stay with the negotiation.

An alternative gives you something to compare with the offer in front of you. It might be keeping an asset, working with another buyer, changing the scope, delaying a start, or staying in your current role. Check that the alternative is real: available within your time, money, obligations, and capacity. An imaginary offer from someone who has never spoken to you belongs in a screenplay, not your negotiating plan.

Before a consequential conversation, separate your preferred result from the minimum terms you can accept. Price may be only one part. Payment timing, workload, responsibility, ownership, support, and the ability to review an arrangement can matter just as much. Check which deadlines are fixed and which are proposals. Know which terms you can change yourself and which need someone else's approval.

Having an alternative does not give you control over the other side. They may also be able to walk away, and your preferred terms may not be workable for them. Ask what problem they need to solve and listen to their answer. New options can emerge during a negotiation as both sides understand the constraints.

After making your request, give the other person room to respond. A pause can stop you from offering a concession nobody has asked for. It can also give someone time to think or formulate a question. You do not need to turn silence into a contest or hang up because I once did. If the conversation becomes unproductive, say that you need a pause and agree on a way to resume, when that is possible.

When Walking Away Is Not Affordable

A founder choosing whether to sell an asset has different options from an employee who needs next month's wages or a supplier dependent on one large customer. Limited bargaining power is a real constraint, not a failure of nerve. The next useful move may be to ask for time to consider terms, get advice, involve a trusted colleague or representative, or negotiate a narrower change that makes the arrangement more manageable.

You may be able to ask for a clearer priority, a written commitment, a staged start, a review date, or a route to raise a problem. Keep building alternatives where you can, including during the negotiation. Do not bluff about an exit you cannot make, or mistake an unmet request for evidence that you should have been more forceful.

If you are the person with the budget or authority, examine how you use that advantage. Someone's dependence on a job can make agreement sound more enthusiastic than it is. Check capacity and invite concerns without making the employee defend their commitment. A workable agreement needs clear terms and the resources to honor them.

The View from the Minority

You know from Chapter 8 that I count rooms. The 1996 conference was an extreme example. Across roughly thirty years in technology and finance, I remember many rooms where women were closer to one in ten. These are my recollections of particular rooms, not a study of either industry.

I noticed who got interrupted, whose idea acquired a new owner ten minutes later, and who received the benefit of the doubt. Preparation helped me make my case, but it did not make those patterns disappear. Nor does anyone have to earn fair treatment by delivering a flawless presentation.

What I could work on was the quality of my preparation, the clarity of my request, the record supporting it, and the relationships around the decision. Keep the receipts: the numbers and the relevant correspondence. Know what they establish and what they do not. If your contribution is misattributed, correct the record in a way suited to the setting; a colleague can help acknowledge whose work it was.

As a founder and CEO, I also had positional authority: the power attached to my role to make decisions and allocate resources. Earned trust is different. People may follow an instruction because I am the boss while doubting my judgment. The responsibility is to use the authority fairly and remain open to correction, rather than treating obedience as evidence that I have earned their confidence.

Politics, Played Clean

Organizational politics includes the informal relationships and conversations that shape formal decisions. It affects whose information gets heard, which priorities receive resources, and who is consulted before a proposal arrives on the agenda. You can participate in that work without treating people as pieces to move around.

Build relationships through real interest in the work and the people doing it. Learn what others are responsible for and ask about their constraints instead of assuming they have hidden motives. Offer useful information, give credit, and follow through on ordinary commitments. Help freely enough that an earlier favor does not become an invoice for agreement.

Before a contested decision, it can be useful to talk with people who understand different parts of the problem. Share the same material facts, invite objections, and make the eventual decision route clear. Private consultation becomes manipulative when you tell incompatible stories to different people, trade someone else's confidential information, or arrange the meeting so disagreement is merely decorative.

Allies can help a concern receive a fair hearing. Their role should not be to silence a dissenter or protect a powerful colleague from examination. If a concern involves misconduct, use the reporting and response routes in Chapter 5; personal influence is not a substitute for handling it properly.

Sample: Negotiating Capacity for a New Client

Illustrative scenario—fictional people and situation. A maintenance business has one owner, Daniel, a service coordinator, Leena, and four technicians: six people in all. Daniel wants to accept a one-week assignment for a new client, starting next Monday. Leena's estimate, checked against the planned visits and travel, is twelve staff hours for that assignment. The technicians' existing schedule has four hours available in total, leaving an eight-hour gap.

Sample negotiation plan. Daniel wants a reliable start within an extra-cover budget of \$500 for the first week. Leena needs a schedule the team can deliver. She can assign work within the agreed schedule; she cannot authorize extra spending or change promises to existing clients.

- **Request:** Agree by noon Wednesday how to cover the eight-hour gap before confirming the full start to the new client.
- **Options to discuss:** Ask the new client to phase the start; defer existing work only with the affected client's agreement; or confirm qualified outside cover. A contractor has quoted \$480 for the required eight hours, including travel and fees, but availability still needs confirmation.

- **Sample opening:** “The full start needs twelve hours and we have four. I can make the schedule once we agree how to cover the other eight. Can you approve the \$480 option if the contractor is available, or would you prefer to negotiate a smaller start with the client?”
- **If there is no agreement:** Leena will keep the current commitments visible, record the uncovered hours, and ask Daniel to decide the priority and handle the client conversation. She will not confirm an unresourced start on the assumption that the technicians can make up the difference outside their agreed hours.
- **If a plan is agreed:** Record the approved spending, who will confirm the contractor or revised client terms, and who will update the schedule. Review planned and actual hours at the end of the first working week before agreeing to any further assignment.

Leena does not need to threaten resignation to make a clear request. She brings the work, the arithmetic, and the limits into view. Daniel still has to decide, and a missing resource remains missing until somebody secures it.

CASE STUDY: Mellody Hobson’s Long Game

Mellody Hobson began at Ariel as a summer intern, became president in May 2000 at thirty-one, and was appointed co-CEO in July 2019. She also chaired DreamWorks Animation. She joined the Starbucks board in 2005 and became its non-executive chair in March 2021. Those milestones span decades of work and several kinds of responsibility. ^[12.1] ^[12.2]

In announcing her promotion, Ariel founder John Rogers described a colleague whose loyalty included independent thinking and helping others see more clearly. That is a useful distinction in an ally. A person who agrees with everything may be easy company and very little help when your judgment needs testing. ^[12.1]

Hobson’s 2014 TED talk urged people to be “color brave”: to discuss race and unequal opportunity directly rather than avoid the subject. She made a difficult issue explicit in a public setting. I take from that a practical challenge to examine what a room has become comfortable leaving unsaid, and to prepare enough to raise it responsibly. ^[12.3]

Her career does not offer a formula that gives everyone the same access or result. It does offer substantial examples of long relationships, professional responsibility, and candor. For someone leading a small team, the work is close at hand: understand a proposal well enough to question it, be a reliable colleague, and make room for information that the person in charge might prefer not to hear.

One Practice

Before your next negotiation or difficult request, write down the result you want, the terms you need, what you can offer, and who has authority to agree. Identify one real alternative or, if none is currently affordable, the advice, time, support, or narrower change that would improve your position. Include the practical cost of each option.

Make the request, explain the relevant reason, and give the other person time to respond. Ask about the constraint behind an objection before changing your offer. Record any agreement in plain language, including responsibilities, limits, and the next date for action or review. Share that record and invite corrections so you can check that both sides understood the same terms. If you do not reach agreement, record what remains open and the next useful step. Afterward, compare what you learned with your assumptions and check whether the promised resources or changes have actually arrived.

In Worksheets and Resources: [Resource 6](#) Negotiation Preparation and Agreement.

Three Questions

1. What can you realistically decline in the negotiation ahead, and what support or narrower change could help where your options are limited?
2. Which facts, terms, or decision responsibilities need to become clearer before either side can make a workable commitment?
3. When you hold more power, what makes it possible for the other person to question the terms or tell you that the agreement is not working?

Chapter 13: The Sustainable Leader

What I Wrote in 2001

In 2001 I was asked to contribute a chapter to a book called *Inside the Minds: Leading Women*. I questioned the premise I was expected to celebrate: that a woman could have it all. My honest answer was that we cannot have it all at once. Life arrives in seasons, and different commitments ask different things of us. Any leadership philosophy that skips the costs is selling you something.

I was a CEO in my thirties when I wrote that, and I want to tell you the embarrassing part first. I wrote the truth years before I fully lived it. Writing a thing and obeying it are different achievements. This chapter is about the distance between them, and the changes to a working life that make it possible to keep leading well.

The Bill Arrives

In Chapter 4 I described the MsMoney executive who accepted half of her previous salary. She had spent a week in the hospital after the strain of an always-on working life. I admired her decision while living my own company around the clock. Knowing the cost did not immediately change my habits.

There came a stretch of years when the bill arrived for me. Work that had given me energy began taking more than it gave. My quickness, patience, and joy wore thin. I could still deliver and present, which made it easier to pretend I was managing. I had spent a career telling teams the truth, and the last person I was honest with was myself.

Forests helped bring me back, and at first they came with teachers. When I wanted to get pregnant with my first child, slowing down stopped being optional. I signed up for a College of Marin class that walked the woods with a naturalist, and a City College of San Francisco class in outdoor painting, where you could spend an entire session drawing one leaf. Sitting with a leaf gave my attention somewhere to go that had nothing to do with the company.

I kept walking among trees long after the classes ended. On those trails, breath, attention, and listening to my body became practices I could use in my own life. The forest had no interest in my quarterly results. Those years shaped the leader who could later coach other executives through their own versions of exhaustion. They also changed how I understood recovery: I needed to make room for it while there was still work to do.

Continuing exhaustion, changes in mood, or trouble functioning deserve support from a qualified health professional. Calling something burnout should not become a reason to stop asking what is happening.

The World Health Organization describes burnout in relation to chronic workplace stress that has not been successfully managed. It classifies burnout as an occupational

phenomenon, rather than a medical condition, and limits the term to the work context.^[13.1] Health difficulties and responsibilities outside work also affect what a person can carry. A leader needs to take those limits seriously without trying to diagnose an employee.

Make the Work Fit

Chapter 4 addressed availability, and Chapter 10 addressed rest and coverage during a crisis. Ordinary weeks deserve the same scrutiny. Put the work you expect beside the hours, skills, and people available to do it. Include meetings, preparation, routine administration, and time to learn. A schedule that fits only when nothing goes wrong is already asking a great deal.

Start with a recurring pressure you can name: a deadline that requires evening work every week, conflicting instructions, or approvals that stop whenever you are away. Ask the people doing the work what gets displaced and what a change would involve. Then decide what can be reduced, delayed, stopped, or properly resourced. WHO's guidance on mental health at work includes changing harmful working conditions and involving workers in those decisions.^[13.2] A mindfulness session may be welcome; the workload still needs a decision.

Illustrative scenario—fictional people and situation. Elena owns a design studio with three employees. In each of the past two weeks, preparing a Friday client presentation has required four hours of evening work from Sam, one of the designers. Elena asks Sam to review the next week's assignments with her before they agree to the same schedule again.

They identify an internal portfolio update, also assigned to Sam, that is expected to take four hours. Elena can move it without affecting a client commitment. She proposes pausing that update for the coming week so Sam can prepare the presentation during working hours, without adding it to another employee's list. She will check with Sam whether that releases enough usable time, confirm the plan, and tell the team about the changed priority before the trial begins.

If a gap appears during the week, Sam will raise it before working extra hours or risking the client commitment. Elena will decide what needs to change then. On Friday, after the presentation, they will compare actual hours with the estimate and check for any evening work or missed commitments. Sam should be able to say the plan failed without being treated as the problem. At the same Friday review, Elena will decide whether to stop the portfolio update, narrow it, or schedule it against time the studio actually has. It will not automatically return on top of another full week.

The same discipline applies when you set a boundary for yourself. Work transferred to a colleague still takes time. Check their existing responsibilities, agree on what they can decide, and remove or resource the work that no longer fits. If you manage inside a larger organization and cannot change a deadline yourself, take the specific conflict, its likely consequences, and workable options to the person who can decide. Keep room for concerns that do not yet come with a solution, as Chapter 5 explains.

People also need to know what a boundary means in practice. State normal response times and a route for genuinely urgent issues. If you send messages outside someone's working hours, make clear when an answer is expected and honor that agreement. Offer support privately, let people choose whether to join optional well-being activities, and do not require personal health details as the price of a reasonable workload conversation.

Reflection as a Discipline

Reflection gives you a chance to notice the gap between the life you intend and the one your calendar is arranging. Keep it small enough to repeat. Start with a few minutes at the end of a workday: what demanded more than you expected, what mattered, and what needs attention tomorrow? Once a week, look for a pattern that calls for a decision. Over a longer interval, make time to reconsider direction as well as pace.

I do much of mine walking, because motion loosens what a desk keeps clenched. You might prefer sitting quietly, writing, making art, or talking with someone you trust. Choose something available to you. Reflection should leave room for insight, not become another elaborate task you are failing to complete.

The Three Questions throughout this book offer a place to begin. Return to an answer after you have acted on it. Did the conversation happen? Did the promised change make a difference? If the same concern keeps returning, it may need a different decision or more help than reflection alone can provide.

The Long Game of Energy

Burnout made me pay attention to what my work demanded of me. I had treated the activities that used energy as essential and the ones that restored it as negotiable. Looking only at time or money left something important out of the account. Rest and meaningful activity can help, but recovery does not follow a fixed timetable, and people do not all have the same health, freedom, or support.

Sequencing still matters to me. There may be a season for building, a season that asks more of you as a parent, or a time when caring for your own health has to shape the plan. Those responsibilities often overlap, and we do not choose every demand that arrives. Having children did not make work disappear. Nor does a business deadline make the rest of a person's life wait politely outside.

For a demanding stretch of work, name its purpose, what will wait, the support needed, and a date to review the load. If the stretch keeps extending, revisit the commitments. Calling it a season does not make it temporary. A meaningful career can take several forms, and leaving a role or changing an ambition may be a considered decision about the life you want to live.

CASE STUDY: Arianna Huffington Reconsiders Success

In her introduction to *Thrive*, Arianna Huffington describes waking on the floor of her home office on April 6, 2007, after a collapse in which she cut her eye and broke her cheekbone.

She attributed the collapse to exhaustion and lack of sleep. While waiting to see doctors afterward, she began questioning a definition of success centered on money and power.^[13.3]

She developed that argument in *Thrive*, published in 2014, describing a further measure of success that included well-being, wisdom, wonder, and giving. *The Sleep Revolution* followed in 2016.^[13.4] In August 2016 she announced that she would leave her role as editor in chief of the Huffington Post to focus on Thrive Global. She explained that running both businesses would require the round-the-clock work she was arguing against. Thrive Global launched that November with the stated aim of addressing stress and burnout.^[13.5]

What I find useful in her account is the decision that accompanied the message: she gave up one role to make room for another. Applying that lesson as an employer also means examining what employees are being asked to carry. Listen when someone says the work is too much, consider what can change in their assignments or support, and check whether the change helps. A person should not have to collapse to make the concern count.

One Practice

Keep an energy ledger for one workweek. At the end of each day, take two minutes to record what gave you energy, what drained it, and any work that ran into time you had meant to protect. Share only the personal reflections you choose to share. Address an urgent concern when it arises rather than waiting for the ledger to end.

At the end of the week, choose one recurring pressure and one change to attempt. Name the work involved, who can authorize the change, what will pause or receive support, and who else would be affected. Check capacity with anyone being asked to help. Arrange one restorative activity that suits your circumstances, whether that is time outdoors, a quiet break, or something else you know helps.

Before trying the change the following week, obtain any needed approval and agree revised commitments with the people affected. If approval or support is still missing, pursue that decision before changing the work. At the end of the trial week, compare planned and actual hours, unfinished work, and whether the time you meant to protect was available. Ask anyone affected what the arrangement cost them. Decide whether to keep it, revise it, or seek a larger change. The ledger gives you evidence for a decision; it is not a score of how well you are recovering.

In Worksheets and Resources: [Resource 7](#) Weekly Energy and Workload Review.

Three Questions

1. Looking at the next ten years, which part of the life you want is your current pace crowding out, and what commitment could you change now?
2. What is your version of my forest, and what practical arrangement would give you access to it this week?
3. Whose time absorbs the overflow when you or your team reach a limit, and have they had a real say in that arrangement?

Chapter 14: Leading in the AI Era

The Hour at the Booth

I sat down at a conference booth and did not get up for an hour. It was September 2022, at SaaStr in the Bay Area, and the booth belonged to a company called Jasper. Its software could draft an article from your instructions in seconds. You told it what you wanted, gave it some direction, and watched the words appear. ^[14.1]

I had been in technology since I started programming at fourteen. The feeling was familiar: I remembered being at Moscone in 1996, trying to take in what the internet would make possible. Over time, I put in more than two thousand hours learning about and building with AI, co-founded and built an AI company, and began keynoting on AI and consciousness. I remain excited by the possibilities. I also want a leader to understand the work between an impressive demonstration and a system other people can depend on.

For years I hosted gatherings at my home through the Conscious Business and Investing Forum I founded. Panels ran in the living room, full of investors, founders, and engineers, and some gatherings brought as many as a hundred people. The tradition outlived the forum itself. At an AI-for-social-good party in the summer of 2024, I passed a microphone around a room of a hundred entrepreneurs and investors and asked what a utopian use of AI for social good would look like. Then I listened, for a long time, to builders describing the world they hoped to help create. It remains one of the most beautiful hours of my career in technology.

I offer that exercise to leaders, with room for people to answer in writing or disagree with the premise. Ask what would be useful, who would benefit, and who might bear a cost. The answers give you possibilities to investigate. Your team needs a say in what is worth doing with the technology, as well as instructions for using it.

What Changes in Your Work

Generative AI produces content, such as text, images, or code, using patterns learned during training. Drafting, summarizing, comparing options, and helping with code are useful tasks to test with it. They still involve assumptions and choices. Analysis is part of leadership, and a report that looks finished may still need someone to check its evidence, calculations, and implications. Begin with a specific piece of work that a person on your team knows well enough to evaluate.

Keep a task distinct from a job. The International Labour Organization's 2025 study of occupational exposure to generative AI judged changes within jobs more likely than complete automation of most occupations. It assessed potential exposure; it did not count actual job losses or promise that particular jobs were secure. ^[14.2] Your staffing decisions need evidence about your own work, including demand, service quality, and the effort required to supervise the tools.

Talk with employees before changing their responsibilities. Ask what the work involves that a demonstration may have missed. Give people paid time to learn, and decide what will pause while they do. If role reductions are under consideration, say so and explain how decisions will be made. If they are not, do not let rumors do your communicating. Chapter 13's capacity question still applies: whose time will absorb the new work? A faster first draft does not settle that question.

What I Mean by Raising AI

My technical co-founder and I spent two and a half years building Liferise, a mindfulness and life-coaching app. We later added a generative AI coach. I wrote 125 meditations and designed 118 Earth Wisdom cards. Forty meditation teachers contributed to the app; its complete collection contained 264 guided meditations and wisdom talks, including other people's work alongside my own. The app earned a 4.9-star rating from about a thousand app-store reviews. Those were reviews of the app, not an evaluation of the AI coach's advice.

Liferise also taught me how much depended on maintaining the software. After my technical co-founder moved on, two firms tried to repair the code, and neither succeeded. We had built something we could not keep running with the help available to us. I now ask who can maintain a system and how another person would take over.

Choosing material mattered to me because someone might reach for it during a hard moment. That concern belongs in the design of the whole product: its intended use, the limits of its advice, and the support available when it cannot help. Good source material cannot guarantee every answer. A coaching product needs particular care about advice that could affect a person's health or well-being, including clear ways to seek qualified human support.

I raised an AI specialist before I ever helped build an AI coach, so the word *raising* comes naturally to me. I use it as a metaphor for care, boundaries, and continuing responsibility. The technical processes need their own names.

Training adjusts a model's internal parameters, the numerical values learned from data.

Fine-tuning is additional training for a particular purpose. **Programming** builds the surrounding software and its rules, connections, and controls. **Prompting** supplies instructions and examples for a task; it does not itself change the model's parameters. ^[14.3]

Supplying an approved handbook or retrieving a passage from a company knowledge base gives the system information to use in answering. It does not necessarily retrain the model. An application's saved memory can also supply information in later conversations without changing the underlying model. Whether a provider separately uses conversations for future training depends on the service, terms, and settings. Check those arrangements before sharing material. ^[14.4] Do not assume that correcting a reply has permanently taught the system to avoid that mistake.

Reviewing means checking what the system produced against reliable evidence and the requirements of the task. Giving it better instructions, supplying better material, and checking its work are related responsibilities. None makes the others unnecessary.

Keep Responsibility Visible

An AI system can produce confident errors, including invented sources, and it can reproduce harmful biases. NIST's generative AI risk profile identifies these risks alongside overreliance on a system. ^[14.5] Notice when relief at having a draft makes you want to skip the checking. Open the source, check the calculation, and look for people or circumstances the answer has overlooked.

Assign decisions to people with the knowledge and authority to make them. AI may help someone prepare for feedback, organize evidence, or make wording easier to understand. The responsible person still needs to establish the facts, explain the decision, hear the employee, and respond. A generated apology is a form letter with better manners if nobody takes responsibility for what happened. Delegating to a qualified colleague can be sensible; giving someone a score from a model and calling the decision settled is a different matter. Explain consequential decisions in language the person can understand, and offer a way to question them and reach someone who can reconsider them.

Before a tool receives customer or employee information, obtain the required approval for that use. Check where the material and outputs are stored, how long they are retained, who can access them, and what deletion involves. Use only what the task needs. A workplace account, a familiar vendor, or a promise in a prompt does not by itself establish permission to share private records.

Give a drafting tool only the access it needs. Connecting it to email, purchasing, or live records requires a separate decision about what actions it may take and what a person must approve. Enforce those limits in the connected systems, give someone authority to stop the workflow, and keep a way to finish the work if the tool fails. Instructions alone cannot carry all of those controls. ^[14.6] The person reviewing needs time, evidence, and permission to reject the output.

A Small Trial With the Team

Illustrative scenario—fictional people and situation. Rosa owns a bookshop with three employees. Ben handles inquiries. They want to test drafting answers to routine questions about opening hours, events, and booking arrangements. Rosa approves the tool and account after checking its information-use, access, and storage arrangements. The test will use a dated copy of the shop's current public information and ten invented questions. No customer messages or personal information will be entered, and the tool will have no connection for sending replies or changing bookings.

One test question asks to reserve the shop for a private event next Thursday. The public page describes event bookings but gives no availability. A draft that says “You're booked” would fail their test. Ben would flag the request for a person to confirm; a plausible promise is still a promise the shop has not made.

Their manual baseline is ten comparable answers requiring 100 staff-minutes, including checking and Rosa's review. Before the one-week trial, Rosa and Ben agree on a limit of three total staff-hours and \$20 in additional tool charges. That includes everyone's setup, learning, drafting, checking, corrections, coverage, and final review. Nia, another of the three employees, will cover Ben during a scheduled learning session. Rosa checks the schedule with those affected and postpones Nia's nonurgent stockroom reorganization so the trial and cover fit within paid hours. They reserve thirty staff-minutes for Friday's review—fifteen minutes each for Rosa and Ben—and stop the other trial work when it reaches two and a half staff-hours.

Sample conversation. Rosa says, “I'm not currently considering cuts to anyone's job or hours. I want to find out whether this helps with a task you know well. Tell me where the trial adds work or misses something important. We'll review the results together on Friday.” If Rosa's position changes, she needs to explain what is being considered and discuss the effects directly.

Ben will prepare the drafts and identify the public information supporting each answer. Rosa will check every answer for accuracy, omissions, and unsupported promises. They will record everyone's time against the shared limit, how many of the ten answers are completed and checked, and what remains unfinished. Ben can pause the test and report a problem to Rosa if private data enters it, a draft invents a booking commitment, or a time or spending limit is reached. Affected output will be withheld while Rosa resolves the issue and decides whether any further work can be authorized within the limits.

At Friday's review, they will compare work completed to the same quality standard and record mistakes and unanswered questions. Finishing fewer than ten answers cannot be counted as a saving over ten completed manual answers. They will separate setup from recurring work while including both in the trial total. Three hours would exceed their 100-minute baseline, even if drafts appeared immediately; a materially wrong answer would fail the quality check regardless of speed. They will decide whether another test is justified, without claiming savings they have not observed. Passing this internal test would not authorize a customer-facing chatbot. Rosa and the team would still need to decide what the next use may do and who will maintain it.

CASE STUDY: Ginni Rometty and Preparing People for Change

Ginni Rometty became IBM's first woman CEO in January 2012 and remained CEO until April 2020. Her tenure included a shift toward cloud and AI. ^[14.7] For this chapter, the useful decisions concern the commitments IBM published and the opportunities it sought to create for people to do changing work.

In January 2017, IBM issued principles for transparency and trust. Rometty's letter in the company's 2016 annual report described AI as a way to augment human intelligence, committed to transparency about where it was used and the data and training behind its

recommendations, and said clients' data and insights belonged to them. The principles also addressed helping people acquire skills. ^[14.8]

Rometty championed *new collar* jobs, emphasizing relevant skills rather than treating a four-year degree as the only route into technical work. IBM launched a new collar apprenticeship program in October 2017. It also helped develop P-TECH, an education model connecting high school, college, and workplace experience. The first school opened in Brooklyn in 2011, before she became CEO, through a partnership involving IBM, New York City public schools, and the City University of New York. ^[14.9] These commitments and pathways need to be examined in practice: who can access them, what support people receive, and what happens when a principle is not honored.

The question I take from this case is whether our plans for technology include a credible plan for people. A small business can examine unnecessary credential requirements, make time for supervised learning, and explain how employees can move into changed responsibilities. A statement about valuing people becomes useful when someone can point to the opportunity, the time, and the person responsible for making it available.

One Practice

List the ten tasks that occupy most of your week. Choose one small task for an internal AI trial, or decide that a simpler template or process would serve it better. For an AI trial, write the purpose, the permitted information, what a usable answer must contain, what it must not claim or do, and who will review it. Include a case where the right response is to ask a person for help.

Measure comparable work using your current process. Obtain the necessary approval for the trial, tool, and permitted information before you start. Agree on a total staff-time and spending limit, what work will pause, and a review date; reserve time for that review. Keep sending and changes to live records disabled. Ask the people affected what support they need and what would make them stop the test. Resolve missing approval, review capacity, or support before running it.

At the review, compare the work people could actually use and the time everyone spent, including setup and corrections. Account for unfinished work. Write down what worked, what failed, and what remains unanswered; then decide whether to test again, revise the approach, or stop. If you continue, name who will maintain the process and check it again when the tool or source information changes. If time is actually recovered, agree where it will go: an overdue conversation, a service improvement, learning, or reducing overload. Put that choice on the calendar and check whether the time remained available.

In Worksheets and Resources: [Resource 8](#) Responsible AI Trial.

Three Questions

1. Which task could AI help with, and who understands it well enough to recognize an answer that sounds convincing but is wrong?
2. What information may your AI tools use, what actions may they take, and who can approve or stop those uses?
3. Who bears the learning and review work in your team, and how will those people help decide what happens to any time recovered?

Chapter 15: Your Leadership Legacy

The Table

I have spent thirty years on stages: keynotes and panels, Stanford and Yale, conference halls and television cameras. I am grateful for those opportunities, because stages are where ideas find an audience. And yet when I think about the work I most hope will matter after me, I picture a kitchen table.

The table is where my children were raised, one question and one dinner at a time. It is where the real conversations of my companies happened, the ones after the meeting, when the slides were off and somebody finally said the true thing. It is where I have coached founders through nights they did not think their companies would survive.

At a table, I have to stay for the answer. Someone can question the advice, explain what I have missed, or need something I do not know how to give.

My children and the people I work with have lives of their own. I do not get to decide what they will carry forward from knowing me. I can take responsibility for what I offer them, the expectations I set, and the work I leave for someone else to finish. That gives legacy a place in an ordinary working day.

The Grandkids Test

A leadership decision has consequences beyond the moment it is made. My way of widening that horizon is the grandkids test: could I explain this choice to my grandchildren, real or someday, including how I made it and whose lives it affected?

You can picture a younger colleague, a neighbor, or someone who may inherit the consequences. The point is to consider what they will have to live with. A decision that meets this quarter's target may leave someone else with an impossible promise next year. A costly choice may deserve to be made, but its cost alone does not make it wise.

I once wrote about the possibility that my someday granddaughters' granddaughters would still face the same narrow access to venture capital. I was expressing my impatience with the pace of change. The PitchBook–NVCA report for 2024 put the share of U.S. venture-capital dollars going to companies with all-female founding teams at 1.8 percent.^[15.1]

I want future generations to have more room to build than that. The useful response is to examine the decisions we can influence now: who gets heard, what evidence we ask for, and whom we help reach an opportunity. Imagining a future audience can prompt that work. People affected today can tell us things our imagined audience cannot.

What You Give Away

Some of the work I value most has involved putting what I know at someone else's disposal. For twenty years, from 2001 to 2021, I advised and coached dozens of women tech CEOs

through Astia, including service on its advisory board. I had received help, too. MsMoney was part of the Women's Technology Cluster, which later became Astia; the pitch coaching and other support I received there are part of the story I tell in *Pitch Perfect*.^[15.2]

In February 2010, Astia reported that 60 percent of companies presenting at its Investor Forums since 2003 had obtained funding or an exit within one year. That figure combines the two outcomes for a selected group of companies.^[15.2]

Those founders did the work of building their businesses. I could help them think through a choice or prepare to be heard. I value having been available for that work, even when I will never know how a company's story ends.

For seventeen years I served the Pachamama Alliance, an organization devoted to the living Earth, as a table captain for its annual gathering. Table captains help bring guests to the event.^[15.3] I note with some satisfaction that table captain is a title that says exactly what I believe. Someone has to make room at the table. These books are another way of passing along what experience has taught me, including the parts I learned the hard way.

Paid work can carry lasting value, too. Paying people fairly, keeping a useful service running, and making time to share knowledge can matter deeply to the people who depend on a business. Volunteering has been part of my life; it is not a measure I can impose on someone else's time. A leader can make room for contribution within the work people are already paid to do.

What Others Can Carry Forward

Legacy becomes easier to work on when you ask what another person would need if you were no longer available. Several threads of this book meet here.

People need room to develop their own judgment. Chapter 5 asks you to support their growth. Part of that support is enough authority to act without waiting for you, including when their considered decision differs from yours. Ask what they want to learn and what would make the responsibility workable.

Practices need people who can maintain and improve them. Chapter 7 asks you to examine the expectations your daily decisions create. A successor should be able to understand why a practice exists and change it when it no longer serves the work. A habit does not earn a permanent place merely because you started it.

Stories need an honest record. The stories experienced colleagues tell new hires can make a decision's meaning visible. Leave room for the difficult parts, the mistakes, and accounts that differ from your own. Record information people need to do the work, and share personal details only with permission.

AI needs continuing human responsibility. Where AI is part of the work, leave clear instructions, appropriate information and permissions, and a person responsible for reviewing and maintaining the system after you move on, as Chapter 14 asks. Someone must still decide whether it is useful and safe enough for its assigned work.

A useful product, a viable business, or a financial commitment can also be part of what continues. Look at what it requires from the next person. Information helps, but so do time, authority, and a way to get support. Sometimes a responsible handoff includes permission to stop doing something.

Sample: A Promise the Next Manager Can Question

Illustrative scenario—fictional people and situation.

The founder of a four-person design studio is preparing to leave daily management. One of the founder's three colleagues will take over as manager. The colleague questions the studio's promise of a first draft in two days: revisions to existing projects can leave too little time for new work within the team's paid hours. They check current client commitments and ask the team what the promise requires.

The founder gives the incoming manager authority to agree feasible deadlines for new work and remains responsible for arranging any changes to existing client commitments. They defer the studio's own website refresh to make room for paid handoff time. Before the founder steps back, they will review the next project's workload and client commitments with the team and assign any unfinished responsibilities. The handoff is still to be tested. Its purpose is to leave someone able to make the commitment work and able to question it.

CASE STUDY: Patagonia Makes a Plan for Its Purpose

On September 14, 2022, Patagonia announced that Yvon Chouinard and his family had transferred ownership of the company to two entities. All the voting stock, two percent of the shares, went to the Patagonia Purpose Trust, created to protect the company's values. The other ninety-eight percent, all nonvoting stock, went to the Holdfast Collective, a nonprofit devoted to environmental work. Profits remaining after reinvestment in the business would be paid to Holdfast as dividends. Patagonia projected roughly a hundred million dollars a year, depending on the health of the business.^[15.4]

Chouinard's letter carried the headline "Earth is now our only shareholder." The legal arrangement was more specific: Patagonia remained a for-profit company, and the family continued to help govern it and guide both entities. These arrangements assigned responsibility for carrying the purpose forward.^[15.5]

The ownership decision followed earlier commitments. Patagonia had long pledged one percent of sales to environmental causes.^[15.5] It opened childcare at its Ventura headquarters in 1983.^[15.6] It switched to organically grown cotton for its spring 1996 line, accepting lower margins and a smaller sportswear range while supply was limited.^[15.7] Its "Don't Buy This Jacket" advertisement appeared in *The New York Times* on Black Friday in 2011, asking customers to consider what they needed before buying.^[15.8]

Those choices give the ownership plan a history. Its future stewards still have to answer for the company's effects on people and the environment. I take a practical lesson from the case:

a commitment needs someone with the authority and resources to act on it, and a way to examine what happens.

For a smaller business, the work may be a handoff like the studio's, a budget that supports a promise, or a clear agreement about who can change a decision. You can begin while you are still there to explain the history and hear what needs to change.

I return to the kitchen table because it keeps this work human for me. There is someone across from me with a question, an ambition, or a view I need to hear. I hope these books have made room for that kind of conversation in your work, too.

You may have something to repair, someone to support, or a responsibility you are ready to share. Begin with the person and the work in front of you. Give them what help you can, and leave room for their answer.

One Practice

Choose one decision from this year whose effects will continue. Write a private page to a grandchild, a younger person, or someone who may inherit those effects. Explain what you chose, who benefited, who carried a cost, and what remains uncertain. Use words a thoughtful twelve-year-old could follow. If the choice needs closer examination, return to Chapter 11's decision record.

Check your account against the facts and, where possible, with someone affected. Invite correction; the person may decline. Choose one step within your authority to repair a commitment or make a responsibility easier to carry forward. Agree who will act and what time or support the work needs. If someone else must approve the change, bring them the proposal. Set a review date after the next relevant work cycle, and name one thing to check, such as a promise kept or a workload reduced. Return to the page and record what happened and what still needs attention.

In Worksheets and Resources: [Resource 2](#) Delegation and Handoff Agreement; [Resource 5](#) Decision Record.

Three Questions

1. What can someone else carry forward and improve without waiting for you, and have you asked what authority and support they need?
2. Which current decision leaves other people carrying a cost or responsibility later? What can you change now, and whose experience should inform that change?
3. Where does your calendar leave too little room for a commitment you care about? What can you realistically change this week?

Worksheets and Resources

Choose the resource that helps with the work in front of you. Each one pairs a completed fictional example with a matching blank worksheet. You can use these pages in any order, alongside the chapter's One Practice and Three Questions.

A completed plan shows what someone intends to do. The examples mark conversations, approvals, results, and reviews that are still pending. Resources 4–8 return to fictional situations introduced in the chapters; Resources 1–3 are separate examples. The sample hours, budgets, and limits are teaching choices.

Use the page links to open an example or your worksheet. Related chapter links return you to the teaching behind the form.

Resource	Chapters	Example	Your worksheet
1. Conversation Preparation and Follow Through Prepare a difficult conversation	3 , 4 , 5 , 6	Open · p. 82	Open · p. 84
2. Delegation and Handoff Agreement Delegate authority and hand over work	1 , 4 , 5 , 15	Open · p. 86	Open · p. 88
3. Small Change and Review Test a belief or a small change	2 , 7 , 8 , 9	Open · p. 90	Open · p. 92
4. First Crisis Response Organize a first crisis response	10	Open · p. 94	Open · p. 96
5. Decision Record Work through a consequential decision	7 , 11 , 15	Open · p. 98	Open · p. 100
6. Negotiation Preparation and Agreement Negotiate terms and capacity	12	Open · p. 102	Open · p. 104
7. Weekly Energy and Workload Review Review workload and protected time	13	Open · p. 106	Open · p. 109
8. Responsible AI Trial Plan and review an internal AI trial	14	Open · p. 112	Open · p. 115

Type beneath the prompts in Word, extending the answer space as needed, or print the blank pages. Keep a dated copy of the plan before adding what happened. Write ‘unknown’ when a fact is missing and ‘pending’ when an action or result is unfinished. If a prompt does not fit, note why.

Keep personal reflections private unless you choose to share them. Share the work decisions and information that other people need, using an appropriate place with suitable access. A concern can be raised before a form is complete or a solution is available.

Further Reading follows the worksheets. Source Notes then identify the research and public records supporting particular claims in the chapters.

Resource 1 Conversation Preparation and Follow Through

Completed example · Page 1 of 1

Chapters 3, 4, 5, 6

Use this worksheet when you need to give feedback, raise a concern, or work through a disagreement. A few notes can help you get to the point and leave enough room for the other person's answer. Prepare the first four fields; complete the others after the conversation and at the review.

Raise urgent risks promptly, even if you have no proposed solution or completed form. A serious safety or misconduct concern needs the appropriate reporting and response process. Keep personal notes private, and record only work information that the people following through need.

Sample—fictional people and situation. Completed fictional plan; actions, agreements, and results marked pending have not happened.

Cora manages a small sign shop. Mateo coordinates customer proofs. Cora is preparing a private conversation about two late proofs. This is a completed preparation plan; the conversation and later review have not happened.

Purpose and setting. Understand the delays and agree on feasible proof timing. Meet privately on Tuesday for twenty minutes during paid working time; send the topic beforehand. This is an ordinary feedback discussion, with the next arrangement still open.

Facts, expectation, and impact. Two proofs were due to customers by noon Friday and went out at 4 p.m., shortening their review time. Cora also assigned Mateo a rush estimate that morning. She has not checked whether both requests fitted Mateo's available time.

Your reaction and opening question. Cora feels frustrated and has been assuming poor planning. Opening: "We agreed to send the proofs at noon, and they went out at 4 p.m. I also added the rush estimate. I want to understand what got in the way. How did those priorities look from your side?"

Possible next step. Propose a two-minute morning priority check during working time for one week. Cora would decide which request moves when deadlines conflict and contact customers about changed promises. Mateo could flag a conflict immediately, without first solving it. Revise this proposal after hearing Mateo.

What you heard. Pending the conversation. Cora will allow time for an answer and offer written follow-up. She will ask about assignments and support, without asking Mateo to explain private circumstances.

Actions and support agreed. Pending Mateo's account. Before they finish, Cora will record the feasible next actions and each person's responsibility, then give Mateo a chance to correct the record. Silence will not be treated as agreement.

Review and repair. Propose a ten-minute review the following Tuesday. Check proof timing, conflicting requests, and time spent on the new arrangement. Cora will also check whether she changed priorities as promised. Results and any further decision remain pending.

A well-prepared opening is only the beginning. If the conversation changes your understanding of the problem, change the plan and explain what you will do next.

[Back to resource guide](#)

Resource 1 Conversation Preparation and Follow Through

Your worksheet · Page 1 of 2

Chapters 3, 4, 5, 6

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Purpose and setting. What needs attention? Is this feedback, an open decision, or an explanation of a decision already made? Choose a private, usable channel and enough time.

Facts, expectation, and impact. Record what you observed, the expectation that applied, and the effect on the work. What is still unknown? Was the expectation clear and feasible?

Your reaction and opening question. Separate your reaction from your interpretation of the other person. Write a factual opening and one question that leaves room for a different account.

Possible next step. Propose an action if you have one. Name the support or priority change you can provide. Which parts need the other person's input or another person's approval?

[Back to resource guide](#)

Resource 1 Conversation Preparation and Follow Through Continued

Your worksheet · Page 2 of 2

Chapters [3](#), [4](#), [5](#), [6](#)

Continue the same worksheet; leave unfinished actions and results marked pending.

What you heard. Afterward, record the other person's account, facts corrected, and any unresolved disagreement. Offer time or written follow-up; personal disclosure is voluntary.

Actions and support agreed. Record who will do what, by when, and what work or support must change. Share the work agreement with those involved and invite corrections. Note anything still undecided.

Review and repair. Set the review date and what you will check. At that review, record what happened, what needs repair, and the next action, owner, and date.

A well-prepared opening is only the beginning. If the conversation changes your understanding of the problem, change the plan and explain what you will do next.

[Back to resource guide](#)

Resource 2 Delegation and Handoff Agreement

Completed example · Page 1 of 1

Chapters [1](#), [4](#), [5](#), [15](#)

Use this agreement before handing over a decision, a recurring responsibility, or a piece of work that has kept returning to you. Complete it together. Distinguish work already part of the role from a proposed stretch. For a stretch, ask whether the person wants it and what support would make it workable.

Keep a copy both people can find. Update it when the scope or available capacity changes, and give the new owner room to choose a different workable approach within the agreed limits.

Sample—fictional people and situation. Completed fictional plan; actions, agreements, and results marked pending have not happened.

Inez owns a three-person stationery shop. Owen is a sales assistant; Tessa is the shift supervisor. Owen wants to learn purchasing. They have agreed to a three-week trial of routine stock reorders. The plan is complete; no trial orders have been placed.

Responsibility and purpose. Owen will place the weekly reorder for approved products so routine purchases do not wait for Inez. This is a development assignment for three weeks. Check current stock and open orders before ordering; record quantities, full cost, and expected arrival.

Decisions and limits. Owen may choose quantities of approved products from the existing supplier, within \$600 a week including tax and delivery. New suppliers, new products, extra spending, and changed customer promises need Inez's approval before commitment.

Paid time and capacity. Allocate two of Owen's paid hours each week, replacing the nonurgent display-refresh project. Training, check-ins, and the final review come from those hours. Inez also reserves her own time for that support. If the work needs more time, Inez will change the workload before adding hours. Review scope and pay before making the assignment permanent.

Information, access, and preparation. Before week one, Inez will provide the approved product list, stock and open-order records, and appropriate supplier-account access. Their first thirty-minute session will walk through an order and cancellation. Owen will identify anything still unclear before placing the first order.

Support and earlier escalation. Hold a fifteen-minute check-in each Wednesday. If records conflict or an order risks a customer commitment, Owen can pause the purchase and contact Inez promptly. Tessa can check records and relay known order status while Inez is away. Decisions reserved for Inez still need her approval; Owen pauses the affected purchase while waiting.

Shared record and communication. Use the shop's shared purchasing record for this agreement, orders, approvals, and open commitments. Inez will explain Owen's authority to Tessa before the first order. Supplier or customer details stay in the appropriate shop records rather than a broadly shared training example.

Review and continuing ownership. At the end of week three, review orders, duplicate purchases, arrival information, actual hours, and questions that required Inez. Owen can propose changing the method or ending the stretch assignment. Confirm any continuing authority and owner of open orders. Results and the permanent arrangement are pending.

A handoff includes the help needed to carry the work. If the agreement relies on someone quietly making up missing time or authority, revise it before calling the responsibility delegated.

[Back to resource guide](#)

Resource 2 Delegation and Handoff Agreement

Your worksheet · Page 1 of 2

Chapters 1, 4, 5, 15

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Responsibility and purpose. What is being handed over, to whom, and for how long? Define the useful result and whether this is an existing duty or a proposed change in the role.

Decisions and limits. What can the person decide independently? What requires consultation or approval, and from whom? State money, quality, timing, and customer-commitment limits.

Paid time and capacity. How much time does the responsibility need, including preparation and review? What work will stop, move, or get support? Does the scope call for a review of the role and pay?

Information, access, and preparation. What records, tools, permissions, and instruction are needed? Who provides them, and when? Confirm access before transferring responsibility.

[Back to resource guide](#)

Resource 2 Delegation and Handoff Agreement Continued

Your worksheet · Page 2 of 2

Chapters [1](#), [4](#), [5](#), [15](#)

Continue the same worksheet; leave unfinished actions and results marked pending.

Support and earlier escalation. When will you check in? What needs attention sooner? Name a backup with clear authority and what the person should do while waiting for a decision.

Shared record and communication. Where will the current agreement and work record live? Who needs to know the new authority, and who will tell them? Include unfinished commitments in a handoff.

Review and continuing ownership. When will you review the result, reasoning, workload, and support? Record what authority continues, what changes, and who owns unfinished work. The next owner may question the practice itself.

A handoff includes the help needed to carry the work. If the agreement relies on someone quietly making up missing time or authority, revise it before calling the responsibility delegated.

[Back to resource guide](#)

Resource 3 Small Change and Review

Completed example · Page 1 of 1

Chapters 2, 7, 8, 9

Use this worksheet to test a leadership habit, address a gap between a value and a daily practice, or try a limited change in how the work happens. Choose a situation where you can observe something useful while keeping existing obligations covered.

Complete the plan with the people doing the work before starting. Keep the original plan when you record the result. A small trial can inform your next decision without explaining every cause or predicting what will happen at a larger scale.

Sample—fictional people and situation. Completed fictional plan; actions, agreements, and results marked pending have not happened.

Nadia owns a four-person translation agency: Nadia, coordinator Ren, and two translators. They have agreed to test a capacity check before promising new deadlines. This completed plan uses fictional starting observations; the trial and its results are pending.

Problem, purpose, and starting evidence. Three of eight routine jobs in the last two weeks were reassigned after work began. Nadia wants more dependable assignments and promises. Missing capacity checks may contribute; changed client requests may also explain the reassignments. The team has not separated those causes.

Change and boundary. For at most four new routine jobs over two weeks, Ren will confirm inputs and timing with the assigned translator before Nadia promises a deadline. Existing jobs keep their agreed plans. Nadia will continue to review urgent work directly.

Owner, authority, and input. Ren coordinates the check; Nadia approves customer commitments and decides whether to continue the trial. The translators helped review the proposed check. Any of the four can raise a capacity problem directly or in writing, without proposing a replacement schedule.

Time, costs, and displaced work. Set aside four paid staff-hours across the team. Reserve one hour for the final review: fifteen minutes each for Nadia, Ren, and both translators. Preparation and trial work have three staff-hours available. Delay the internal glossary-cleanup project to make room. Use existing records and tools. Nadia will check the allocation before each trial job; no client deadline moves without her agreement with the client.

Reasons to pause and fallback. Ren can pause new trial jobs if preparation and trial work reach three staff-hours or the process puts a client commitment at risk. Nadia then handles new commitments directly. Every accepted job keeps a named owner and confirmed deadline while they resolve the problem.

Evidence and review time. At the end of week two, review each trial job's assignment changes, reasons, deadline status, and staff time. Hear how the check affected each person's work. Compare cautiously with the earlier eight jobs; their difficulty and client demands may differ. Leave undelivered jobs pending. Nadia will name an owner and reserve time for a later check before claiming a completed result.

Decision and follow-through. Pending. Nadia will decide whether the check is workable within capacity and useful enough to retain or revise. Fewer reassignments alone will not justify continuing if promises slip or effort exceeds the limit. Record the decision, changes to responsibilities, and any follow-up on unfinished jobs.

You can finish a careful trial with an unanswered question. Record what it did establish, what it cost, and whether another attempt is worth the time and effort.

[Back to resource guide](#)

Resource 3 Small Change and Review

Your worksheet · Page 1 of 2

Chapters 2, 7, 8, 9

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Problem, purpose, and starting evidence. What do you want to improve, for whom?

Record a recent observation, your interpretation, and a plausible alternative explanation.

Note what you still need to establish.

Change and boundary. What will change, for which work and period? State what is excluded and what must continue. If the next step is a conversation or observation, define that instead of inventing a trial.

Owner, authority, and input. Who owns the change and the final decision? What can others influence? How can they raise a concern, including privately or without a solution?

Time, costs, and displaced work. Count preparation, learning, extra work, and review. What paid capacity and money are available? Name work to postpone or support, and get any approval required.

[Back to resource guide](#)

Resource 3 Small Change and Review Continued

Your worksheet · Page 2 of 2

Chapters 2, 7, 8, 9

Continue the same worksheet; leave unfinished actions and results marked pending.

Reasons to pause and fallback. What would make the trial unsafe or unworkable? Who can pause it, and how will you protect people and unfinished commitments? Urgent concerns do not wait for the review date.

Evidence and review time. What will you record, including costs and effects on people? When will enough be observable to review? Use comparable records where available and identify incomplete observations.

Decision and follow-through. At the review, record what happened and what remains uncertain. Decide whether to keep, adjust, extend, or stop, with a reason, owner, and next date. Explain the decision to those affected.

You can finish a careful trial with an unanswered question. Record what it did establish, what it cost, and whether another attempt is worth the time and effort.

[Back to resource guide](#)

Resource 4 First Crisis Response

Completed example · Page 1 of 1

Chapter 10

Use this worksheet to organize the first few hours of a disruption, or to rehearse one in a calm week. If people face immediate danger, protect them and obtain appropriate help before completing a form.

Date the record and update it as facts arrive. Put sensitive details in the appropriate restricted record rather than in a widely shared response page.

Sample—fictional people and situation. Completed fictional plan; actions, agreements, and results marked pending have not happened.

Chapter 10's print shop: Amira and four employees. It is Tuesday at 9 a.m.; the main printer has stopped, and three customer orders are due Wednesday. This is a completed initial plan. The checks, decisions, and outcomes remain pending.

Immediate harm and first facts. Tuesday, 9 a.m.: the printer is unavailable; no one is hurt. Three Wednesday orders are at risk. Keep the printer out of use pending a qualified assessment. The cause and repair time are unknown.

Response owner and backup. Amira coordinates. Luis, the production lead, is the backup and may approve a plan within the limits below after the required checks. A larger commitment requires Amira's approval.

Checks and first actions. By 10:30 a.m., Luis checks repair timing and an outside printer's capacity and quote; Priya checks customer deadlines and restrictions on outside production. The external bookkeeper checks available cash and dated payment obligations with Amira before the 11 a.m. decision.

Decision, obligations, and limits. At 11 a.m., Amira chooses outside production, seeks agreed deadline changes, or develops another workable option. Up to \$1,200 for outside work may be considered only after confirming affordability and customer requirements. No revised delivery date has been promised.

First message and next update. Priya will update all three customers by 11:30 a.m., using the confirmed plan where one is available. If a customer's plan is still unconfirmed, her message is: 'Our main printer has stopped, putting your Wednesday order at risk. We are checking repair and outside-printing options. I will update you by 3 p.m., even if a decision is still open.' Amira also gives the team a written update at 11:30 a.m.

Coverage and gap to close. Pause jobs requiring the failed printer. At 11:30 a.m., Amira will assign revised work and owners for each order, checking availability before arranging end-of-day handoffs. Staff will have a clear end to scheduled work. Outside capacity is unknown; Luis must confirm it or report the gap by 10:30 a.m.

Review and remaining harm. Proposed review: Thursday at 10 a.m., led by Amira. Check each order against its agreed commitment, then examine extra cost, workload, missed deadlines, and the cause. Give remaining customer problems and any backup-production work an owner and date. The review has not happened.

Keep the first record. Add actual decisions, messages, and handoffs with their times, updating each message to match what is known at the time. If a commitment fails sooner, act then rather than waiting for the review.

[Back to resource guide](#)

Resource 4 First Crisis Response

Your worksheet · Page 1 of 2

Chapter 10

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Immediate harm and first facts. What happened, as of what time? Who or what is at risk? Separate confirmed facts from unknowns.

Response owner and backup. Who coordinates, who covers an absence, and what may each person authorize?

Checks and first actions. Name the immediate actions, their owners, the evidence needed, and when each person must report back.

Decision, obligations, and limits. What commitments must be protected? When is a decision needed? Record spending limits, approvals, and any specialist advice required.

[Back to resource guide](#)

Resource 4 First Crisis Response Continued

Your worksheet · Page 2 of 2

Chapter 10

Continue the same worksheet; leave unfinished actions and results marked pending.

First message and next update. Draft what happened, what it changes for the recipient, what is uncertain, and the next update time. Who sends it, to whom, and how?

Coverage and gap to close. Which work pauses? Who covers open issues at handoff, and when can people finish work? Name one assumption about money, access, expertise, or capacity to check now.

Review and remaining harm. When and with whom will you check the commitments and close the response? Who owns unresolved harm and preventive changes?

Keep the first record. Add actual decisions, messages, and handoffs with their times, updating each message to match what is known at the time. If a commitment fails sooner, act then rather than waiting for the review.

[Back to resource guide](#)

Resource 5 Decision Record

Completed example · Page 1 of 1

Chapters 7, 11, 15

Use Chapter 11's record for a consequential choice, including a values conflict in Chapter 7 or a promise someone will inherit in Chapter 15. Take urgent protective action before completing the record.

Date the record. Separate facts from assumptions, and proposals from completed actions. Preserve the original reason when you add the review.

Sample—fictional people and situation. Completed fictional plan; actions, agreements, and results marked pending have not happened.

Chapter 11's consultancy has one owner and four employees. On Wednesday afternoon, an analyst finds an omitted supplier fee in a client report. The client plans to discuss the project Thursday; a renewal conversation with the consultancy is scheduled Friday. This completed record describes the proposed correction, not a completed repair.

Decision and authority. The owner must decide how to notify the client and correct the report today. The client controls its project decision. The analyst who reported the error is not responsible for negotiating the business consequences.

What is known and what needs checking. The supplier quote contains an \$8,000 fee omitted from the \$32,000 report estimate; the quoted total is \$40,000. A second colleague will check the arithmetic and other recommendations today. The owner will ask whether the client has used or circulated the report.

People and competing interests. The client needs accurate costs. Friday's renewal creates commercial pressure on the owner to delay. The analyst and second colleague will advise on correction time. The second colleague will check the correction and question the repair plan. The client's timing and preferred response still need to be heard.

Constraint and alternatives. Leaving the client to rely on a known material error is unacceptable. Notify it now, then issue a checked correction today if feasible, or seek agreement to a later delivery and changed discussion time. Waiting for a perfect replacement could leave the client acting on the wrong figure. If it has already acted, repair may be more difficult and needs urgent attention.

Chosen action and reason. The owner will contact the client this afternoon, take responsibility, and ask it to hold decisions based on the affected estimate. After checking staff capacity, the owner will propose a time to deliver the corrected report and seek the client's agreement. The client's response is still unknown.

Time and cost. Reserve two paid working hours for the analyst and two for an independent colleague to correct and review the report. The owner will defer internal proposal research to create capacity; other client deadlines remain commitments. The consultancy absorbs the correction time.

Follow-through. The owner will mark the old estimate as superseded and send the checked correction to the people who received it. Friday: check remaining effects and assign any revised checking step an owner and date. Evidence of prior reliance calls for an urgent assessment of corrective action now. Results and renewal remain pending.

Invite affected people to correct the account through a channel they can use, and explain what their input can change. They may decline. Share the reasoning people need while protecting private personal details.

[Back to resource guide](#)

Resource 5 Decision Record

Your worksheet · Page 1 of 2

Chapters 7, 11, 15

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Decision and authority. What must be decided, by when, and by whom? Who controls any related decision?

What is known and what needs checking. List verified facts and sources, estimates, assumptions, and missing information that could change the choice. Name a checker and deadline.

People and competing interests. Who may benefit or bear a cost, including later? Whose input is missing? Note any personal stake and how it will be checked independently.

Constraint and alternatives. What obligations, rights, safety requirements, or promises constrain this choice? Separate duties from terms that need agreement to change. Compare feasible options, their benefits, costs, uncertainties, who bears them, and reversibility. Identify any qualified advice needed.

[Back to resource guide](#)

Resource 5 Decision Record Continued

Your worksheet · Page 2 of 2

Chapters 7, 11, 15

Continue the same worksheet; leave unfinished actions and results marked pending.

Chosen action and reason. What is chosen, why, and what disagreement remains? Record the next action and owner, including any agreement still needed.

Time and cost. What paid time, money, and support are needed? Which work will move? Who approves the resources, and which existing commitments need agreement to change?

Follow-through. Who receives the decision or correction, by when, with what privacy limits? Set a review date, owner, consequences to check, and evidence that would change the action. Add findings when available.

Invite affected people to correct the account through a channel they can use, and explain what their input can change. They may decline. Share the reasoning people need while protecting private personal details.

[Back to resource guide](#)

Resource 6 Negotiation Preparation and Agreement

Completed example · Page 1 of 1

Chapter 12

Prepare before a difficult request, then return after the conversation to record what was actually agreed. Keep proposed terms and confirmed commitments separate.

If walking away is not affordable, include a narrower change, time to consider terms, advice, or support that could improve your position.

Sample—fictional people and situation. Completed fictional plan; actions, agreements, and results marked pending have not happened.

Chapter 12's maintenance business has Daniel, the owner; Leena, the service coordinator; and four technicians: six people in all. A proposed one-week client assignment starts next Monday. This is Leena's preparation; no agreement or successful result is supplied.

Result and timing. A schedule the team can deliver. Request a decision by noon Wednesday on how to cover an eight-hour gap before confirming the full start next Monday. The requested start is still a proposal to resolve with Daniel and the client.

Facts, minimum terms, and authority. Planned visits and travel require twelve staff hours; four hours are available in total, leaving eight uncovered. Leena can assign agreed hours. Daniel must approve extra spending or changes to client promises. A full start needs confirmed cover; otherwise, the scope or timing needs agreement to change.

What I can offer. Leena can organize a workable schedule once coverage or revised terms are confirmed. She cannot promise contractor availability or a client's acceptance of a changed deadline.

Alternatives and costs. A qualified contractor has quoted \$480 for the required eight hours, including travel and fees; availability is unconfirmed. Daniel's extra-cover budget is \$500, but this spending is not yet approved. Other possibilities: ask the new client to phase the start or defer existing work with the affected existing client's agreement. Neither change is secured.

Opening and questions. 'The full start needs twelve hours and we have four. Can you approve the \$480 cover if availability is confirmed, or negotiate a smaller start?' Ask Daniel which client commitments are fixed and whether another constraint makes these options unworkable.

Agreement or open issue. Pending. Leena requests a decision from Daniel by noon Wednesday. If there is no agreed plan, she will record the eight-hour gap and ask him to choose the priority and handle the client conversation. Contractor availability, spending approval, and any changed client terms remain unconfirmed.

Resources and implementation. Proposed responsibilities: Daniel authorizes cost and confirms the contractor or revised client terms; Leena updates the schedule after confirmation. If the outside cover falls through, return the gap to Daniel for a decision before promising the full start. The technicians' extra hours are not assumed.

Review. Proposed: at the end of the first working week, Leena and Daniel compare planned and actual hours, cover, cost, and staff constraints before accepting further work. Technicians can raise a coverage problem earlier; Daniel remains responsible for resource decisions. No result has been observed.

Keep the shared record of agreements and open items. Before confirming work, check that its resources are secured; when work starts, check that they arrived. Give the people doing the work a way to raise a gap.

[Back to resource guide](#)

Resource 6 Negotiation Preparation and Agreement

Your worksheet · Page 1 of 2

Chapter 12

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Result and timing. What result do you want? Which deadline is fixed, and which is proposed?

Facts, minimum terms, and authority. Which records support the request? What terms do you need? What can each side approve?

What I can offer. What can you contribute without promising another person's time, money, or agreement?

Alternatives and costs. List available options and possibilities still needing confirmation, with costs and limits. If none works now, what narrower change, advice, time, or support could help?

[Back to resource guide](#)

Resource 6 Negotiation Preparation and Agreement Continued

Your worksheet · Page 2 of 2

Chapter 12

Continue the same worksheet; leave unfinished actions and results marked pending.

Opening and questions. Write the request and its reason. What constraint do you need to understand? Leave room for the other person to respond.

Agreement or open issue. After talking, record what was agreed, by whom, with responsibilities, limits, and dates. What remains open, and who takes the next step? Share the record and invite corrections.

Resources and implementation. Who will confirm money, staff time, access, and any changed commitment? What happens if a needed resource does not arrive?

Review. When will you compare the agreement with what happened? Who can raise a problem, what will be checked, and who decides a change?

Keep the shared record of agreements and open items. Before confirming work, check that its resources are secured; when work starts, check that they arrived. Give the people doing the work a way to raise a gap.

[Back to resource guide](#)

Resource 7 Weekly Energy and Workload Review

Completed example · Page 1 of 2

Chapter 13

Use this with Chapter 13's energy ledger. At the end of each workday, take two minutes to note the hours you planned, the hours you worked, and anything that spilled into time you meant to protect. Personal energy reflections are optional. Keep those notes private and share only what you choose.

At the end of the week, use the work record to propose one change. Include meetings, preparation, routine work, and any help the change requires. Obtain the necessary agreement before altering commitments. Use a fresh five-day record for the trial week and keep the first one for comparison. Address an urgent concern when it arises; you do not need to finish a worksheet first.

Sample—fictional people and situation. Fictional pre-trial observations; the proposed workload change and its results remain pending.

This completed ledger shows one of the two weeks described in Chapter 13, before the proposed workload trial. Elena owns the studio and has three employees, including Sam. Sam planned forty hours of work and worked forty-four, including four evening hours preparing Friday's client presentation. The next-week change is a proposal; its results are still pending. The hours are fictional teaching values.

Five-day record

Count actual work hours once, including work outside your planned schedule. Describe protected time and unfinished work in the third column. The last column is optional; omit it from a shared copy if you want those reflections to stay private. Use a row for each workday, including weekend work; add rows or another copy when five are not enough.

Day or date	Work hours: planned / actual	Overflow or unfinished work	Private energy note— optional
Monday	8 / 8	No evening work.	Quiet design work held my attention.
Tuesday	8 / 9	1 hour of presentation preparation in the evening.	Meetings left me with little energy for the draft.
Wednesday	8 / 9.5	1.5 hours of presentation preparation in the evening.	My attention was fading by the evening session.
Thursday	8 / 9.5	1.5 hours of presentation preparation in the evening.	I missed the evening I had planned away from work.

Day or date	Work hours: planned / actual	Overflow or unfinished work	Private energy note— optional
Friday	8 / 8	Presentation delivered; no evening work. The internal portfolio update was also completed during the week.	The presentation mattered to me. I was ready for a break.

Week total: 40 planned hours; 44 actual hours; 4 hours of evening overflow. Actual hours already include the overflow.

[Back to resource guide](#)

Resource 7 Weekly Energy and Workload Review Continued

Completed example · Page 2 of 2

Chapter 13

Sample—fictional people and situation. Fictional pre-trial observations; the proposed workload change and its results remain pending.

Week and commitments. Sam's record for the week before the trial. Commitments: Friday's client presentation, routine design work, and the internal portfolio update. The work was completed, but four presentation hours came from evenings Sam meant to protect.

Recurring pressure. Presentation preparation has required four evening hours in each of the past two weeks. This ledger details one of those weeks. The studio's schedule has not left enough working time for that preparation.

One proposed work change. Elena proposes pausing next week's four-hour internal portfolio update and reserving that time for the presentation. It will stay off the other employees' lists. Sam and Elena will check that the released hours fall before the client deadline and are enough for the work.

Authority, agreement, and effect on others. Elena can move the internal update. Before the trial she will agree the revised assignments with Sam, check that client commitments still fit, and tell the team which priority has changed. No additional work is assigned to another employee. Agreement and the team update are pending.

Boundary and response to a gap. Sam's evenings are outside the proposed work plan. If a gap appears, Sam will tell Elena before working extra hours or putting the client commitment at risk. Elena will decide what to change. A concern can be raised before Sam has a solution.

Something restorative—optional and private. Sam would like a quiet lunch away from the screen on Wednesday. Sam will take the usual lunch break and leave the work phone at the desk. This personal choice does not replace the workload change.

Review arrangement. After next Friday's presentation, Sam and Elena will compare the new week's planned and actual hours, check whether protected time remained available and whether any commitment was missed, and ask whether the change displaced work onto anyone else. Sam's private energy notes are not required for this conversation.

Actual result and next decision. Pending—the trial has not begun. Elena will decide whether to stop the portfolio update, narrow it, or schedule it against available time. It will not return automatically on top of another full week.

The useful result is a decision about the work and the support it needs. Keep the ledger out of employee scoring, and do not ask for health details to make a workload concern count.

[Back to resource guide](#)

Resource 7 Weekly Energy and Workload Review

Your worksheet · Page 1 of 3

Chapter 13

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name _____ Week beginning _____

Five-day record

Count actual work hours once, including work outside your planned schedule. Describe protected time and unfinished work in the third column. The last column is optional; omit it from a shared copy if you want those reflections to stay private. Use a row for each workday, including weekend work; add rows or another copy when five are not enough.

Day or date	Work hours: planned / actual	Overflow or unfinished work	Private energy note— optional

Week total: planned hours of work ____; actual hours of work ____; work in protected time ____ (already included in actual hours).

[Back to resource guide](#)

Resource 7 Weekly Energy and Workload Review Continued

Your worksheet · Page 2 of 3

Chapter 13

Continue the same worksheet; leave unfinished actions and results marked pending.

Week and commitments. Record the week, your role, and the commitments the work must support. Note unfinished or displaced work as well as completed work.

Recurring pressure. Name one pressure and the evidence for it. What does the current plan leave out?

One proposed work change. What will be reduced, delayed, stopped, or resourced? Estimate the time released and check whether it is usable when needed.

Authority, agreement, and effect on others. Who can authorize the change? Who needs to be heard or informed? If someone will help, what will come off that person's schedule? Record missing approvals.

[Back to resource guide](#)

Resource 7 Weekly Energy and Workload Review Continued

Your worksheet · Page 3 of 3

Chapter 13

Continue the same worksheet; leave unfinished actions and results marked pending.

Boundary and response to a gap. What time are you protecting? If the work no longer fits, who must decide what changes, and when should the concern be raised?

Something restorative—optional and private. Choose something available to you. What practical arrangement would make room for it? Sharing this answer is your choice.

Review arrangement. Set a review after the trial week. Compare planned and actual hours, unfinished commitments, protected time, and the effect on anyone who helped.

Actual result and next decision. After the review, record what happened and what remains unfinished. Keep, revise, or seek a larger change; name who will act and the next review date.

The useful result is a decision about the work and the support it needs. Keep the ledger out of employee scoring, and do not ask for health details to make a workload concern count.

[Back to resource guide](#)

Resource 8 Responsible AI Trial

Completed example · Page 1 of 3

Chapter 14

Use this with Chapter 14 to plan a small internal trial, then record what happened. Choose a task someone knows well enough to check. Consider whether a simple template or process would serve it better. Complete the approvals, capacity plan, quality standard, and stopping rules before the test begins.

Keep the original plan when you add results. Record everyone's trial time, including preparation, learning, coverage, checking, corrections, and the final review. Identify whether the manual baseline comes from a prior record or requires new work to measure; count any new measurement effort. A completed plan supplies no evidence that the AI workflow saves time.

Sample—fictional people and situation. Fictional plan with a prior manual baseline; no AI trial results have been observed.

This is the bookshop trial from Chapter 14. Rosa owns the shop and has three employees. Ben handles inquiries; Nia will provide cover during his learning session. The manual baseline is a completed observation within this fictional scenario. The AI trial remains a plan: no AI answers, savings, or successful outcomes have been observed. The limits below are sample planning choices, not benchmarks or product recommendations.

Task, purpose, and scope. Test drafts for ten invented questions about opening hours, events, and booking arrangements. Decide whether another internal AI test is justified. Compare the effort with manual answers using the same public information; a reusable answer template remains an option.

Approved tool and information. Rosa has approved one drafting tool and account after checking provider training use, access, storage, retention, and deletion arrangements. Her recorded approval check took twenty staff-minutes, counted as trial preparation. The shop's restricted trial record identifies the account and checked settings. Allowed input: a dated copy of the shop's current public information and ten invented questions. No customer messages, employee records, or other personal information may be entered.

Permitted actions and record handling. The tool has no connection for sending replies or changing bookings. Ben prepares drafts in the internal trial record; Rosa reviews them there. Rosa and Ben have access. Rosa owns the record's retention and deletion steps under the checked account arrangements. Nothing is sent to customers during this test.

Quality standard and a case requiring help. Every answer must be accurate, understandable, supported by the dated public information, and free of unsupported promises. Ben identifies the supporting passage; Rosa checks each answer for errors and omissions. A request to reserve the shop next Thursday must be referred for human confirmation because the source gives no availability. "You're booked" would fail.

[Back to resource guide](#)

Resource 8 Responsible AI Trial Continued

Completed example · Page 2 of 3

Chapter 14

Sample—fictional people and situation. Fictional plan with a prior manual baseline; no AI trial results have been observed.

Manual baseline and comparability. A prior manual record shows ten comparable answers requiring 100 staff-minutes, including checking and Rosa’s review. They cover the same kinds of routine inquiries. This is the comparison baseline, with no new 100-minute assignment. Any additional time Ben and Rosa spend checking comparable scope and difficulty counts toward the trial cap.

People, paid capacity, and staffing communication. Ben drafts; Rosa approves and reviews. Nia covers Ben’s scheduled learning session. Rosa postpones Nia’s nonurgent stockroom reorganization and checks the whole allocation with those affected so the trial fits paid hours. Rosa tells the team she is not currently considering job or hours cuts and will explain directly if that position changes.

Time, spending, and reserved review. AI trial cap: 180 staff-minutes and \$20 in additional tool charges. This includes everyone’s preparation, any new baseline measurement or checks, learning, coverage, production, corrections, and review. Reserve 30 staff-minutes for Friday: 15 each for Rosa and Ben. Stop other trial work at 150 minutes. The prior 100-minute baseline remains a separate comparison value.

Time and cost record. Preparation already completed: Rosa’s approval check, 20 staff-minutes. New baseline checks and remaining setup: pending; learning and coverage: pending; drafting/checking/corrections: pending; final review: pending; additional charges: pending. Recorded trial time so far: 20 minutes. Of the 160 minutes left, 30 remain reserved for review, leaving 130 for other trial work. Final time and charges: pending. Ben maintains the shared record; Rosa checks it against the caps. The existing 100-minute manual record is not added as a new trial cost.

[Back to resource guide](#)

Resource 8 Responsible AI Trial Continued

Completed example · Page 3 of 3

Chapter 14

Sample—fictional people and situation. Fictional plan with a prior manual baseline; no AI trial results have been observed.

Pause conditions and fallback. Ben can pause and contact Rosa if private information enters, a draft invents a booking commitment, or a time or spending limit is reached. Withhold the affected output. Rosa resolves the problem and decides whether further work is possible within the limits. Routine inquiries continue through the shop's manual process. A pause does not consume the reserved review time on further drafting.

Output and error record. Pending—the AI trial has not run. Ben will record all ten case IDs, and Rosa will check each output. A materially wrong answer fails the quality check even if it is quick to draft. Correcting that answer does not erase the initial error from the record.

Review, decision, and continuing ownership. Friday review with Rosa and Ben: pending. Compare ten completed manual answers with the AI work that actually meets the standard. Fewer than ten usable answers cannot count as a saving over the full baseline. Separate setup from recurring effort and keep both in the trial total. If the reserved review time is insufficient, record the open questions and arrange time before continuing. Rosa owns the next decision; Ben would maintain approved material and instructions for any authorized further test. Tool or source changes require another check. This trial authorizes no customer-facing chatbot.

Use of any verified time recovered. No time has yet been recovered. If later evidence supports it, Rosa will agree the use with the team and put it on the calendar. A possible use is reducing inquiry-related overflow; the decision remains open.

Bring the record to a decision. Test changes to prompts, supplied information, or the workflow; correcting one answer does not establish future reliability. Keep a human owner, the approved information, and a manual fallback available if the work continues.

[Back to resource guide](#)

Resource 8 Responsible AI Trial

Your worksheet · Page 1 of 3

Chapter 14

Record the date and people involved. Write beneath the prompts; extend the answer space when needed. Keep the plan and add later findings with their dates.

Name or team _____ Date _____

Task, purpose, and scope. Name the task, the decision the trial should inform, the number and type of cases, and a simpler option worth considering.

Approved tool and information. Record the tool/account, model or version where available, approval date and owner, permitted information, and the location of the approval record. Check provider training use, access, storage, retention, and deletion arrangements for this use.

Permitted actions and record handling. Keep live sending and changes to records disabled. Record who can access the trial material, where results belong, and who will carry out the agreed retention or deletion steps.

Quality standard and a case requiring help. What makes an answer usable? What must it never claim or do in this trial? Include a case where the reviewer must refer a decision to a person.

[Back to resource guide](#)

Resource 8 Responsible AI Trial Continued

Your worksheet · Page 2 of 3

Chapter 14

Continue the same worksheet; leave unfinished actions and results marked pending.

Manual baseline and comparability. Record completed manual work, its date and source, all staff time, and the same quality standard. Identify a prior record or newly measured work. Match scope and difficulty; record any new effort needed to establish the baseline separately from the comparison value.

People, paid capacity, and staffing communication. Name the people doing, covering, and reviewing the work. What will pause to make room? Ask what support they need and state what staffing changes, if any, are being considered.

Time, spending, and reserved review. Set a total staff-time cap and additional-charge cap. Include new baseline preparation, setup, learning, coverage, drafting, checking, correction, and review. Reserve review time before spending the rest.

Time and cost record. Keep dated entries showing person, activity, minutes, and charge. Total new baseline measurement/checks; preparation/setup; learning and coverage; drafting/checking/corrections; and final review separately. Include all new work in the trial total without counting the same minutes twice.

[Back to resource guide](#)

Resource 8 Responsible AI Trial Continued

Your worksheet · Page 3 of 3

Chapter 14

Continue the same worksheet; leave unfinished actions and results marked pending.

Pause conditions and fallback. Name who can stop the test, what requires a pause, who receives the concern, and how unfinished work will be handled. A prompt alone does not enforce access limits.

Output and error record. For each case, record its ID, source passage, first-review result, errors or missing output, corrections, and final usability. Count unfinished cases separately. Preserve serious errors after correction. Use a separate dated row or note for each case.

Review, decision, and continuing ownership. At the agreed review, compare completed, usable work at the same standard, total time, charges, mistakes, and unanswered questions. Decide whether to revise, test again, or stop. Name the owner and fresh checks for any next test.

Use of any verified time recovered. If comparable results show time is available, agree with the people affected where it will go and when you will check that it stayed available.

Bring the record to a decision. Test changes to prompts, supplied information, or the workflow; correcting one answer does not establish future reliability. Keep a human owner, the approved information, and a manual fallback available if the work continues.

[Back to resource guide](#)

Further Reading

Start with the topic you are working on now. These books and talks expand on perspectives in the chapters; the Source Notes identify evidence for specific claims.

Readings

The Fearless Organization — Amy C. Edmondson. Speaking up and learning in teams. Chapter 5.

Mindset — Carol S. Dweck. Beliefs about ability and learning. Chapter 2.

Insight — Tasha Eurich. Self-awareness and how others see us. Chapter 3.

My Life in Full — Indra Nooyi. Her account of leadership, work, and family. Chapter 2.

American Icon — Bryce G. Hoffman. A reported account of Alan Mulally's work at Ford. Chapter 5.

Net Positive — Paul Polman and Andrew Winston. Their argument for a business's wider responsibilities. Chapter 11.

Thrive — Arianna Huffington. Her reconsideration of success and well-being. Chapter 13.

Good Power — Ginni Rometty. Her leadership experiences and approach to change. Chapter 14.

Let My People Go Surfing — Yvon Chouinard. His account of building Patagonia and its business philosophy. Chapter 15.

Talks

Color blind or color brave? — Mellody Hobson (TED2014, March 2014). An argument for talking openly about race and opportunity. Chapter 12.

The anti-CEO playbook — Hamdi Ulukaya (TED2019, April 2019). His view of a company's responsibilities to employees and communities. Chapter 7.

More from My Work

This book completes my Business Books Series. Pitch Perfect focuses on communicating an idea and making a useful pitch; The Growth Code turns to building and growing a business. All three books are by Tiffany Joy Basse.

msmoney.com. Explore the financial education resources we built at MsMoney.

omfund.vc. Read about OM Impact Fund's investment focus.

tiff.com. Find my current work and contact information.

The Three Questions at the end of each chapter are also resources you can return to. Work through them privately or with someone you trust, then revisit an answer after you have acted.

[Back to resource guide](#)

Source Notes

The first number identifies the chapter; the second identifies the note. My business and family stories, including personal figures, are my own accounts. The notes provide links to research and public records, as well as first-person interviews and company-reported results.

Chapter 1

1.1 Mary Barra, testimony before the U.S. House Committee on Energy and Commerce, April 1, 2014, in *The GM Ignition Switch Recall: Why Did It Take So Long?*; Barra press conference, CNN transcript, April 1, 2014. House hearing; Press conference transcript

1.2 General Motors, Form 8-K, June 5, 2014, Exhibits 99.1–99.2: Valukas investigation, personnel actions, safety changes, and compensation program. GM filing

1.3 U.S. Department of Justice, Southern District of New York, announcement of GM deferred prosecution agreement, September 17, 2015. Includes admissions, forfeiture, monitoring, and subsequent cooperation. DOJ announcement

Chapter 2

2.1 Amy Edmondson, “Psychological Safety and Learning Behavior in Work Teams,” *Administrative Science Quarterly* 44, no. 2 (1999): 350–383. The study identifies association; its cross-sectional design does not demonstrate causality. doi:10.2307/2666999

2.2 Carol Dweck, interview with Clifton B. Parker, “Perseverance Key to Children’s Intellectual Growth, Stanford Scholar Says,” *Stanford Report*, April 29, 2015. Stanford interview

2.3 David S. Yeager et al., “A National Experiment Reveals Where a Growth Mindset Improves Achievement,” *Nature* 573 (2019): 364–369. The study concerns U.S. secondary-school students and identifies differences by student and school context. doi:10.1038/s41586-019-1466-y

2.4 PepsiCo, CEO succession announcement, August 6, 2018. Provides Nooyi’s tenure and company-defined product categories as a share of revenue in 2006 and 2017. PepsiCo announcement

2.5 PepsiCo, 2016 Annual Report, p. 8. Reports global production water-use efficiency for 2006–2015; the figure is not a reduction in absolute water consumption. Annual report

2.6 Indra Nooyi interview, *Fortune*, January 28, 2014. Interview

Chapter 3

3.1 Daniel Goleman, “Emotional Intelligence: Issues in Paradigm Building,” in *The Emotionally Intelligent Workplace*, edited by Cary Cherniss and Daniel Goleman (Jossey-Bass, 2001), 13–26; excerpt reprinted by the Consortium for Research on Emotional Intelligence in Organizations. The four areas here adapt his organizing framework. Framework excerpt

3.2 Lisa Feldman Barrett et al., “Emotional Expressions Reconsidered: Challenges to Inferring Emotion From Human Facial Movements,” *Psychological Science in the Public Interest* 20, no. 1 (2019): 1–68. doi:10.1177/1529100619832930

3.3 Thomas Sy, Stéphane Côté, and Richard Saavedra, “The Contagious Leader,” *Journal of Applied Psychology* 90, no. 2 (2005): 295–305. Experiment with 189 students in 56 groups on a brief task; it does not establish lasting effects in workplaces. doi:10.1037/0021-9010.90.2.295

3.4 James J. Gross, “Emotion Regulation: Current Status and Future Prospects,” *Psychological Inquiry* 26, no. 1 (2015): 1–26. Regulation includes several strategies; their usefulness depends on the person, situation, and goals. doi:10.1080/1047840X.2014.940781

3.5 Microsoft, CEO appointment announcement, February 4, 2014; Stephen J. Dubner, “Extra: Satya Nadella Full Interview,” *Freakonomics Radio*, March 11, 2018 (recorded September 2017); Economic Club of Washington, D.C., Nadella event excerpts, October 4, 2017, pp. 2–3. The interviews give Nadella’s account of learning empathy and changing culture and organizational structures. Appointment; Interview; Event excerpts

3.6 Microsoft, “Microsoft Announces Restructuring of Phone Hardware Business,” July 8, 2015. The figure is the announced reduction of up to 7,800 positions, primarily in the phone business. Announcement

Chapter 4

4.1 First Lady’s Office, “Schedule for Hillary Rodham Clinton,” March 29, 2000, p. 3 (Clinton Presidential Records; reproduced PDF, p. 505), lists MsMoney.com’s virtual ribbon cutting. The launch narrative is the author’s recollection. MsMoney launch presentation (2000), recording supplied by the author. Launch recording; Released March 29 schedule

4.2 Royal Commission of Inquiry into the Attack on Christchurch Mosques on 15 March 2019, report (2020), Part 1, chapter 2, paragraph 32, for the final death toll; Jacinda Ardern, statement on the shootings, March 15, 2019, for “They are us.” Commission report; March 15 statement

4.3 Jacinda Ardern, Christchurch update, March 16, 2019, 3:30 p.m.; parliamentary statement, March 19, 2019. These records describe the visits, security and burial concerns, support arrangements, and her decision not to name the attacker. March 16 update; March 19 statement

4.4 New Zealand Government, “New Zealand Bans Military Style Semi-Automatics and Assault Rifles,” March 21, 2019. The announcement distinguishes the planned legislation from the interim reclassification that took effect that day. March 21 announcement

4.5 Royal Commission of Inquiry, report (2020), Part 10, chapter 4, paragraphs 1–4 and recommendation 25. Describes gaps in coordination and continuing support and recommends a continuing contact to help affected people navigate services. Recovery recommendations

Chapter 5

5.1 Amy Edmondson, “Psychological Safety and Learning Behavior in Work Teams,” *Administrative Science Quarterly* 44, no. 2 (1999): 350–383. The study defines team psychological safety and examines its association with learning behavior in fifty-one teams in one manufacturing company. doi:10.2307/2666999; Full article

5.2 Amy C. Edmondson, “Learning from Mistakes Is Easier Said Than Done: Group and Organizational Influences on the Detection and Correction of Human Error,” *Journal of Applied Behavioral Science* 32, no. 1 (1996): 5–28. The eight-unit hospital study could not disentangle actual medication errors from willingness to detect and report them. Reprinted in 2004, vol. 40, no. 1, pp. 66–90; that reprint is the same study. Original article: doi:10.1177/0021886396321001; 2004 reprint

5.3 Ford Motor Company, Form 8-K, September 8, 2006, Item 5.02. Mulally’s appointment was effective September 1, 2006; Ford announced it on September 5. SEC filing

5.4 Jim Morgan and Alan Mulally, “People-First Leadership: A Conversation Between Jim Morgan and Alan Mulally,” Lean Enterprise Institute, September 1, 2021. The red-chart episode is Mulally’s retrospective account of Ford’s early business-plan reviews. Interview transcript

Chapter 6

6.1 Xerox Corporation, Form 8-K, May 21, 2009, Item 5.02, records Burns’s appointment effective July 1, 2009. Wake Forest University School of Business’s account of its February 11, 2013 conversation with Burns identifies her as the first African American woman CEO of a Fortune 500 company. Xerox SEC filing; Wake Forest conversation

6.2 Claire Oliver, “Ursula Burns Isn’t Interested in Fitting In,” *Chief*, March 21, 2022, reporting Chief’s conversation between Burns and Janeen Uzzell. The quotation is Burns’s description of her own style. Conversation account

6.3 Stuart Crainer and Pearl Doherty, “Leading the Way: Ursula Burns,” *London Business School*, November 29, 2012. Burns discusses her work with Anne Mulcahy and keeping a superior informed about problems and important matters. Interview

Chapter 7

7.1 Hamdi Ulukaya, interviewed by Adam Grant, “The anti-CEO playbook,” *ReThinking*, TED, June 20, 2023, especially the discussion at 11:34–17:51. Ulukaya describes buying the factory in 2005 and his intentions toward workers and the community. This is his account of those choices, not an independent evaluation of their effects. TED interview transcript

7.2 Stanford Graduate School of Business, “Hamdi Ulukaya: Creating the Right Environment,” *View From The Top*, April 4, 2022. The interview identifies the 2016 program with roughly 2,000 employees, including factory workers. The legal terms are described separately in note 7.3. Stanford GSB interview

7.3 Chobani Inc., Form S-1, filed November 17, 2021, “Organizational Structure—Incentive Plans” and Notes to Consolidated Financial Statements, note 13, “Growth Sharing Plan.” The 2016 growth units were conditional awards, not membership interests. The filing describes a company-value threshold, four years of service for full vesting, an IPO or sale condition, and replacement by the 2020 Value Sharing Plan. Chobani 2021 S-1

Chapter 8

8.1 Silicon Graphics and Netscape, contemporary press release dated February 12, 1996, conference notice: the Netscape Internet Developer Conference was scheduled for March 5–7 in San Francisco. Tiffany’s visit to Moscone Center and her count of women in the hall are personal recollections. Archived SGI/Netscape press release

8.2 Melanie Perkins, “21 Questions from Aussie Startups: Highs, lows & lessons learned during Canva’s journey so far (Part 1),” Canva. First-person retrospective on design teaching, Fusion Books, paying customers, technical recruitment, and investor networking. Melanie Perkins’s account

8.3 Canva, “Canva lands in San Francisco: A creative hub in Silicon Valley,” section “A full-circle moment.” The company recounts more than 100 investor rejections and Cameron Adams’s recruitment as a cofounder. The number is reported by Canva; refusals are not treated here as a measure of an idea’s quality. Canva founding retrospective

8.4 Canva, “Canva makes graphic design amazingly simple for everyone,” launch announcement dated August 26, 2013. The announcement describes initial limited access in the United States and Australia. Canva launch announcement

8.5 Canva, “Our Two-Step Plan,” section “30% of Canva’s value for good.” The company reports that Perkins and Obrecht pledged the vast majority of their equity in 2021. A pledge is distinct from a completed donation or a measured philanthropic outcome. Canva’s philanthropy pledge

Chapter 9

9.1 Xerox Corporation, 2002 proxy statement, July 30, 2002, Report of the Executive Compensation and Benefits Committee, p. 14. Mulcahy’s appointment as CEO took effect on August 1, 2001. Xerox proxy statement

9.2 Knowledge at Wharton, “The Cow in the Ditch: How Anne Mulcahy Rescued Xerox,” November 16, 2005. Lecture and interview with Mulcahy on reorganization and listening. Appointment and earnings dates are documented in Xerox’s records in notes 9.1 and 9.3. Wharton lecture and interview

9.3 Xerox Corporation, “Xerox Reports Fourth-Quarter 2002 Earnings of 1 Cent Per Share; Operational Results Significantly Exceed Expectations; Company Returns to Full-Year Profitability,” January 28, 2003. The release reports net income for 2002 after restructuring charges. Xerox 2002 earnings release

Chapter 10

10.1 Simon Kwan, “The Stock Market: What a Difference a Year Makes,” FRBSF Economic Letter 2001-17, June 1, 2001. The contemporaneous Federal Reserve Bank of San Francisco account dates the Nasdaq Composite’s peak to March 10, 2000. FRBSF Economic Letter

10.2 Marriott International, video message from Arne Sorenson to associates, March 19, 2020; contemporaneous account of his remarks and appearance in Carmine Gallo, “Marriott’s CEO Demonstrates Truly Authentic Leadership in a Remarkably Emotional Video,” Forbes, March 21, 2020. Original Marriott video post; Contemporaneous account of the remarks

10.3 Marriott International, “Marriott International Provides Business Update,” March 18, 2020, filed with the SEC; and 2021 proxy statement, Compensation Discussion and Analysis, pp. 33–34 and 38. The update sets out operating and liquidity measures; the proxy documents the actual base-salary reductions from April through December 2020, other compensation, and Sorenson’s death on February 15, 2021. March 18, 2020 business update; 2021 proxy statement

Chapter 11

11.1 Cartier Women’s Initiative, “Previous Editions,” 2010 entries, and “Thereza Bukow,” updated March 2010. The archive lists Bolsa Cheia as a finalist among fifteen enterprises reaching the final stage. The profile describes its financial-education purpose and Tiffany’s involvement. Her cofounding and business-plan account also appears in Pitch Perfect. Cartier 2010 awards archive; Cartier Bolsa Cheia profile

11.2 Duke University, Fuqua School of Business, “Mastercard Chairman Ajay Banga Defines Decency in Business,” March 11, 2021; Mastercard, financial-inclusion commitment announcement, April 28, 2020. The latter reports the 500 million goal achieved through more than 350 programs across 80 countries and the new one-billion target for 2025. The measure concerns access to the financial system and digital economy. Duke interview account; Mastercard April 2020 announcement

11.3 Unilever, Annual Report and Accounts 2009, CEO review, printed page 5; Unilever Sustainable Living Plan, November 2010, printed pages 3 and 6–7. The annual report dates the removal of guidance to the beginning of 2009. The original plan sets out the growth ambition and separate social and environmental targets. Unilever 2009 annual report; Original November 2010 plan

11.4 Unilever, May 11, 2018 stock-exchange announcement, company description, SEC Form 6-K exhibit 99.1; Unilever Sustainable Living Plan 2010 to 2020: Summary of 10 Years’ Progress, March 2021, printed pages 3–4 and 18, and page 38, note 17. The water metric covers consumer use of six water-using product categories in seven water-scarce countries; it is distinct from factory water consumption. Dated company brand-growth comparison; Unilever ten-year progress report

11.5 Unilever, response to Kraft Heinz proposal, February 17, 2017; Unilever and Kraft Heinz, joint withdrawal statement, February 19, 2017, both filed with the SEC. The approximately \$143 billion figure is the proposal’s equity value. February 17 proposal and rejection; February 19 joint withdrawal statement

Chapter 12

12.1 John W. Rogers Jr., “Important Promotion and Company Update,” Ariel Investments, July 10, 2019; Mellody Hobson, “Ariel Investments Case Study Part 1: Watch Your Feet,” MasterClass preview transcript. Rogers records her roles and describes their working relationship. Hobson dates her presidency to May 2000 at age thirty-one. Ariel promotion letter; Hobson’s career account

12.2 Starbucks, “Starbucks Announces the Appointment of Mellody Hobson as Non-Executive Chair of the Board,” December 9, 2020, SEC exhibit; Starbucks 2022 proxy statement, Hobson biography. The proxy confirms the March 17, 2021 start following the appointment announcement; the release also records her 2005 board appointment. Starbucks appointment release; 2022 proxy confirmation

12.3 Mellody Hobson, “Color Blind or Color Brave?,” TED2014, March 2014. The talk advocates addressing race and unequal opportunity openly. Hobson’s TED2014 talk

Chapter 13

13.1 World Health Organization, “Burn-out an Occupational Phenomenon: International Classification of Diseases,” May 28, 2019. Explains the ICD-11 classification, its link to chronic workplace stress, and its specific occupational scope. WHO classification explanation

13.2 World Health Organization, “Mental Health at Work,” September 15, 2026, sections on workplace risks, prevention, and worker participation. The guidance includes changes to working conditions and meaningful involvement of workers and their representatives. WHO mental health at work guidance

13.3 Arianna Huffington, *Thrive* (Harmony, 2014), introduction, excerpted with the publisher’s permission in “Huffington on Redefining Success,” WTTW, May 1, 2014. Her account dates the collapse to April 6, 2007, in her home office, describes the injuries, and places her later reflection in doctors’ waiting rooms. The explanation of the collapse is her own account. Authorized excerpt of Huffington’s account

13.4 Arianna Huffington, *Thrive* (Harmony, March 25, 2014) and *The Sleep Revolution* (Harmony, April 5, 2016). Penguin Random House’s edition records establish the original publication dates; *Thrive*’s introduction describes well-being, wisdom, wonder, and giving as elements of the proposed further measure of success. *Thrive* edition record; *The Sleep Revolution* edition record

13.5 Thrive Global, “Arianna Huffington’s New Company Thrive Global Closes Series A Funding Round,” August 11, 2016, pp. 1–2; company launch release, November 30, 2016. The August announcement includes her explanation for stepping down from the Huffington Post. The November release records the launch and the company’s stated purpose, rather than demonstrated outcomes. August 2016 company announcement (PDF copy); November 2016 launch release

Chapter 14

14.1 SaaStr, “1 Week to SaaStr Annual! Know Before You Go,” 2022. The organizer records the event on September 13–15, 2022, at the San Mateo County Events Center. The Jasper booth encounter is the author’s recollection. SaaStr event information

14.2 Paweł Gmyrek et al., Generative AI and Jobs: A Refined Global Index of Occupational Exposure, ILO Working Paper 140, May 20, 2025, doi:10.54394/HETP0387. Estimates potential exposure of tasks and occupations; it does not measure subsequent job losses. ILO paper and research summary

14.3 Google, Machine Learning Crash Course, “LLMs: Fine-tuning, Distillation, and Prompt Engineering,” updated December 3, 2025. Distinguishes further training from instructions and examples supplied in a prompt; prompting itself does not alter model parameters. Google technical explanation

14.4 IBM, “What Is Retrieval Augmented Generation (RAG)?” (October 21, 2024; updated October 2, 2026); Anthropic, “Bringing Memory to Claude,” September 11, 2025, updated October 23, 2025; and “Updates to Consumer Terms and Privacy Policy,” August 28, 2025. These describe distinct mechanisms: retrieving information, saving context, and permitting later provider training. Product terms and settings must be checked for the particular service and use. IBM retrieval explanation; Anthropic memory explanation; Anthropic consumer training-choice announcement

14.5 National Institute of Standards and Technology, Artificial Intelligence Risk Management Framework: Generative Artificial Intelligence Profile, NIST AI 600-1, July 2024, doi:10.6028/NIST.AI.600-1, section 1 and sections 2.2, 2.4, 2.6, and 2.7 on generated content, confabulation, data privacy, harmful bias, and human–AI configuration, including overreliance. NIST generative AI risk profile

14.6 Anthropic, “Building Effective Agents,” December 19, 2024, section on agents; UK National Cyber Security Centre, “Prompt Injection Is Not SQL Injection (It May Be Worse),” December 8, 2025, sections on secure design and monitoring. Discuss human checkpoints, stopping conditions, and controls that restrict a system’s possible actions beyond instructions in a prompt. Anthropic agent design guidance; NCSC design and monitoring guidance

14.7 IBM appointment announcements, October 25, 2011, and January 30, 2020, filed with the U.S. Securities and Exchange Commission. Rometty became CEO on January 1, 2012; Arvind Krishna succeeded her on April 6, 2020. IBM’s “Women in Technology” history identifies her as its first woman CEO. 2011 appointment announcement; 2020 succession announcement; IBM history

14.8 Ginni Rometty, chairman’s letter in IBM’s 2016 Annual Report, pp. 22–23. Describes principles issued in January 2017 on augmentation, transparency, clients’ data and insights, and skills. These are the company’s published commitments, not evidence that every use or employment decision fulfilled them. IBM annual report letter

14.9 IBM, “IBM Apprentices Reinvent Their Careers with New Collar Skills,” records the apprenticeship program's October 2017 launch. IBM's November 17, 2020, P-TECH announcement dates the first Brooklyn school to 2011 and names the founding partners. These accounts describe access routes and education models, not guaranteed employment outcomes. IBM apprenticeship account; IBM P-TECH history and model

Chapter 15

15.1 PitchBook and National Venture Capital Association, Q4 2024 PitchBook–NVCA Venture Monitor, January 2025, p. 17, “Female founders.” Data as of December 31, 2024: all-female founding teams received 1.8 percent of U.S. VC deal value; teams with at least one female founder received 21.7 percent. These are different, overlapping categories, and the figures measure deal value rather than deal count. PitchBook–NVCA report, p. 17

15.2 Astia, “Astia Entrepreneurs Continue to Buck the Tough Funding Climate,” February 2, 2010, especially “About Astia.” Organization-reported result for selected Investor Forum companies since 2003: 60 percent obtained funding or an exit within one year of presenting. The release describes screening and advisory support; it does not isolate their effect on the reported outcomes. Astia's “Our History” records the Women's Technology Cluster name and its 2007 rebranding. The account of receiving support is the author's, also told in Pitch Perfect. Astia release via GlobeNewswire; Astia organizational history

15.3 Pachamama Alliance, “Mission and Vision,” undated; and “Pachamama Alliance Annual Fundraiser Luncheon,” September 20, 2011. The first describes the organization's environmental purpose and partnership with Indigenous Amazonian peoples; the second describes volunteer table captains inviting guests to its annual gathering. The seventeen years of service are the author's recollection. Pachamama Alliance mission; 2011 gathering and table-captain role

15.4 Patagonia, “Patagonia's Next Chapter: Earth Is Now Our Only Shareholder,” September 14, 2022. Company announcement identifies the recipients and share split, explains dividends from profits not reinvested in the business, and projects roughly \$100 million annually, conditional on business health. September 14 is the public announcement date; the forecast is not a measured annual payout. Patagonia ownership announcement

15.5 Yvon Chouinard, “Earth Is Now Our Only Shareholder,” September 14, 2022, and Patagonia's ownership FAQ, accessed October 12, 2026. The quoted sentence is the letter's headline. The letter and FAQ describe the share rights, continuing for-profit business, family involvement, and one-percent-of-sales commitment. They establish the stated arrangements and intentions rather than guarantee future conduct. Chouinard letter and Patagonia ownership FAQ

15.6 Patagonia, announcement of Family Business: Innovative On-Site Child Care Since 1983, August 8, 2016. Dates the company's childcare program to 1983 and identifies the center at its Ventura headquarters. Patagonia childcare history

15.7 Michele Bianchi, “How We Got Here: Organic Cotton,” Patagonia, March 25, 2021. Company retrospective dates the switch to the spring 1996 line and describes lower margins and a reduced sportswear range during the initial shortage of organically grown cotton. Patagonia cotton history and tradeoffs

15.8 Patagonia, “Don't Buy This Jacket, Black Friday and the New York Times,” November 25, 2011, with notes added in 2022. Describes the advertisement's publication and intended message about consumption. Patagonia's account of its 2011 advertisement

A Note of Gratitude

I learned to lead through the people who worked beside me, challenged me, supported me, and sometimes made me close the laptop and go for a walk. I am grateful for what we built together and for what you taught me when things did not go as planned.

I want to begin with Shirin Hedayat, my business partner at OM Impact Fund. Building the fund together deepened my belief that investing can support founders and a better world. Thank you for the partnership, the conversations, and the decisions we shared about where to place our capital.

To the investors, entrepreneurs, technologists, and changemakers who came to my hundred-person pool parties in San Rafael, thank you. What began in my yard became a community discussing conscious investing and AI for social good. Many of you joined panels and generously shared your experience. You helped create a place where we could consider both financial success and the consequences of what we were building.

Ruby Ye and Payam Safa, through Light Dao, brought people together across the San Francisco technology community. You made room for curiosity, generosity, and friendship in a world that can feel crowded with transactions. Thank you for creating a place where I felt at home.

To the people at UC Berkeley, Stanford, and Yale who invited me to speak, teach, or participate in entrepreneurship programs, thank you. I am also grateful to the industry conferences, organizations, and hosts who trusted me with their audiences. Those invitations let me share lessons beyond the companies I built and the founders I coached directly.

To the hundreds of entrepreneurs I have coached and advised, and to everyone whose pitch I have heard, thank you for trusting me with work whose outcome was still uncertain. I watched you risk money, careers, and security, keep going after rejection, change direction, succeed, fail, and begin again. Your willingness to try, and to revise a plan when it needed revising, taught me more than a textbook could.

I remember standing on your side of the table, asking someone to believe. I remain especially grateful to my MsMoney investors Bernie Skomra, Michael Rubenstein, and Chris Cooper. Three men chose to put their capital behind a company devoted to women's financial empowerment. They believed in me and our mission before the outcome was certain.

To Wells Fargo, thank you for entrusting MsMoney with the \$1 million engagement to help design and rebuild your entire website, host it until it went live, participate in focus groups, and build a financial education center. You gave our small company the opportunity to make financial education available on a scale we could not have managed alone.

To Viacom, thank you for buying the intellectual property I created through Thrive Media at ten times the amount you originally offered. That experience changed how I understood the value of my work and the importance of giving myself time to consider an offer.

Thank you to Disney and CBS News for featuring me and giving me a platform to discuss financial health, and to the media organizations that covered MsMoney. The Wall Street Journal, USA Today, Forbes, Fortune, Wired, CNN, PBS, and many other outlets brought attention to our work. I remain grateful to the journalists, producers, editors, and interviewers who thought it was worth sharing.

A special thank you goes to Hillary Clinton, then First Lady, for accepting my invitation to join MsMoney's launch and a roundtable with nine women technology CEOs at the Women's Technology Cluster. Her presence meant a great deal to a young founder working on women's financial empowerment. I have never forgotten that she said yes.

And then there are the women who shaped the earliest chapters of my entrepreneurial life. Cate Muther, founder of the Three Guineas Fund, created the Women's Technology Cluster, which later became Astia. Thank you for building a place where women entrepreneurs could be taken seriously, challenged, supported, and connected to capital. That community changed what was possible for me.

Thank you to Sharon Vosmek for championing women CEOs through Astia and working to expand access to capital. To the women founders and CEOs I met through that community and in the years that followed, thank you for your courage and ambition. I watched you build companies and pursue funding in rooms where few people looked like you.

Some of you became important role models for me. You showed me different ways to lead with strength and grace, and that I did not have to become someone else to run a company.

To the people who worked beside me inside the companies I built, thank you for your talents, ideas, energy, and years of work. Many of the lessons in these pages came from things we figured out together, including what to do when a plan failed. The people who joined my companies trusted me with a substantial part of their lives. I have never taken that lightly.

And then there was Kelsey. During some of the craziest years of building my company, my dog had no interest in venture capital, websites, board meetings, or whatever emergency seemed impossibly important that day.

Kelsey cared about walks.

Every day she demanded that I leave the computer and take long walks around the Palace of Fine Arts and along the beach at Crissy Field overlooking the Golden Gate Bridge. She made me breathe, look at the water, and remember that an entire world existed outside the company. I am quite certain she kept me sane.

To my parents, thank you for loving me through an unconventional life and for giving me the confidence to create my own path. Entrepreneurship brought extraordinary highs and some spectacular lows, and through all of them I knew where home was.

To my children, thank you for your love, patience, humor, and support through my roller-coaster life as an entrepreneur. You lived through the companies, risks, long days, travel,

victories, disappointments, reinventions, and times when I had no idea what would happen next.

You have always been the most important part of my story. Much of what I have tried to build comes from wanting to leave the world a little better for you and the generations who will follow.

Finally, thank you to Claude, created by Anthropic, for helping me research, organize, and edit the accounts and ideas I brought to this book. The experiences belong to the people who lived them. I remain responsible for the account and its conclusions.

To everyone who believed in me, loved me, opened a door, or trusted me with a part of their entrepreneurial journey, thank you. You helped shape this book, whether or not your name appears here. I am deeply grateful.