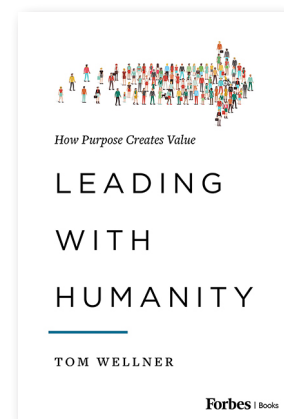


Leading with Humanity

How Purpose Creates Value

by **Tom Wellner**



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THE SUMMARY IN BRIEF

Change happens, adversity in business is inevitable, and a leader's decisions always have human consequences. So, when a crisis knocks at your organization's door, the only question worth asking is, "Are the decisions you take as a leader human-focused?"

The book *Leading with Humanity: How Purpose Creates Value* unlocks precious ideas, innovative approaches, and actionable methods for leaders to lead their organizations through difficult times. It serves as a roadmap to building cultures that enable people to excel and organizations to succeed.

By putting his colorful personal experiences on the table, author Tom Wellner shows us how to strike the right balance between purpose and profit, adapt to change through innovation, and take a human-first approach toward our organizations' success.

IN THIS SUMMARY, YOU WILL LEARN:

- How to leverage courageous curiosity to foster innovation.
- How to adapt to change through innovation.
- How to establish the equilibrium between purpose and profit.
- To achieve excellence by building cultures of respect, integrity, and compassion.

Introduction: Be Good and Do Right

Building a resilient, agile, purpose-driven culture where people want to accomplish good things for others, even when no one is looking, starts with us, at whatever level we provide leadership. Accomplishing these demands doesn't mean changing our natural curiosity. It means making sure that the culture we develop at work reflects the best parts of who we are and where we come from. When the companies we lead need to change to remain competitive, it doesn't have to come at the expense of our humanity.

This book is about leadership and life, and it tries to offer ways to balance what can seem to be competing demands. It shows us how to:

- Foster individual, inquisitive minds and still interact with and learn from others.
- Learn to retain the best from the past and still remain relevant for the future.
- Apply inquisitive thinking and original problem-solving to face a crisis when it arrives and avoid the next crisis by planning for the future we can't see yet.

I hope that by the time you reach the end of this book, you will agree that we can create work cultures where we respect the people we serve and still attain sustainable economic results.

Chapter 1: Stay Strong, Stay Focused: Leading through Adversity

Acting with resilience when adversity arises will require individuals to dig deep within themselves, but they have a better opportunity to overcome difficult circumstances when their organizations consistently foster cultures of agility, innovation, transparent communication, and team member empowerment. Smart companies invest in good risk management strategies, and such traits can become focal points of that development.

As leaders we hope we will never have to put these strategies to use, but as we all know a Black Swan event like a global pandemic can very quickly help put these strategies into action. The best way to apply our learnings in times of crisis is to have insatiable knowledge appetites and open minds. As leaders, we must create cultures where the desire to apply learnings becomes locked into the culture's DNA.

Part 1: An Insatiable Mind: Leveraging Courageous Curiosity to Foster Innovation

Chapter 2: Say Hello: Discovering the Entrepreneurial Path

I don't know if it's possible for someone to be born an entrepreneurial-minded businessperson or if it is a learned orientation. What I do know is that I was fortunate enough to be born into a great environment for learning about the entrepreneurial spirit. Throughout my life, I had several mentors who proved inspirational and who helped shape my thinking.

The premium I place on education and lifelong learning has been a critical part of my leadership, not only in continuous self-education but also in making certain we offer programs for our employees to expand their knowledge formally and by ensuring we create environments where learning is supported and reinforced. Organizations must define their values by three pillars – lead self, lead others, and lead functions.

As a leader, have you created a culture that supports an entrepreneurial spirit? Ask yourself, “Does my organization have a systematic framework for guiding employee education specific to their responsibilities?” “Is there a formalized mentoring program in place?” “Do we create mechanisms for interaction between team members who work directly with our customers and those who do not have customer-facing responsibilities?” “Does my organization have a means in place to support candidate interaction between frontline workers and senior managers?”

Chapter 3: Love What You Are Doing: Finding Creativity in Curiosity

As much as we should value the curiosity that drives learning, curiosity needs a purpose. Facts may be interesting, and research may be rewarding, but if the learning we do is not focused on pragmatic solutions for an identifiable problem, then it is not going to result in any meaningful change or new opportunities. A big part of applying creative thinking is learning how to frame problems and how you view them. We have to balance the visionary with the practical. Doing so starts by genuinely loving what you are doing.

Create a culture where insatiable curiosity is celebrated. When we create an atmosphere where leaders are not afraid to show that they still have things to learn, then the natural consequence is for team members to be willing to

learn what they don't know. Being comfortable admitting our vulnerabilities is critical to transforming our enterprises because the very idea of innovation requires a culture that supports risk-taking.

If curiosity drives the desire to learn and learning determines the ability to grow, together these forces foster a climate where creativity can thrive.

Chapter 4: Buy the Barn: Thinking in New Ways

The path toward innovation requires the creative ability to think in new patterns. A central part of what we associate with entrepreneurs is new thinking. Successful leaders and entrepreneurs see new markets and new customer demands before they emerge. That usually means that new thinking is uncomfortable. But if we can embrace some uncomfortable thinking, we might just discover some ingenious approaches to seizing new opportunities. Ask the following questions to create a culture that inspires ingenuity:

- How do you encourage uncomfortable thinking in your organization?
- Have you created an environment that supports risk-taking?
- In meetings at all levels, do you have a system in place that encourages a specific period for open discussion of new ideas? How do you then move that discussion to specific actions?
- Do you have systems in place to encourage and reward employees to explore new markets, new systems, and new products?

Chapter 5: Communicated with Clarity: Giving Voice to Collective Values

The best lessons and the newest ideas don't have a lot of value if we can't communicate what we've learned. Communication that demonstrates how an organization is applying past lessons to future actions is required internally and externally in equal measures and with consistent clarity.

If our leaders don't reflect our corporate values, we are doomed before we start. Everyone will take their cue from authentic leaders, and they'll know the difference. From there, we need to build inclusive communication styles from a bottom-up perspective rather than from a top-down one, and we need to build silo-free platforms to encourage information exchange. Only by seeing from perspectives different from our own, can we begin to see the bigger picture.

Part 2: The Innovative Agenda: Adapting through Invention

Chapter 6: Empower and Invest: Cultivating the Desire to Innovate

At its heart, innovation is about change. Change is part of human nature. Because people change, the cultures they create change. And because culture changes, the things people want and need change, so markets change. To stay relevant in business, we've always got to be remaking ourselves to adapt to these new demands. If we are not innovative in our problem-solving, we get left behind.

The only way to adapt to change is to create a culture that invests in innovation. Be aware of examples of innovations or entrepreneurial thinking that are already going on in your business. Catalog innovative practices your team members have quietly put in place. Incentivize the would-be problem-solvers in your enterprise. Create a dedicated team that would be focused on introducing innovation into your company. Have people in place who are experienced in evaluating the adoption of new technologies. Finally, invest in people who have the skills and expertise to guide your enterprise through change.

Chapter 7: Do What You Do Best: Identifying Abilities and Leveraging Partnerships

You can't invest in innovation unless you already know what you do well. One of the important abilities a leader can bring to a business is to provide a comprehensive assessment of the company's breadth and identify its strengths and weaknesses. We also have to think like outsiders. We have to be as objective as possible.

Think of an organization as an organism with a lifespan. To lengthen that lifespan, an organization (like an organism) must adapt and change. Because potential partners have specific expertise, multiple partnerships can make us nimbler. Truly partnering with others who bring new strengths, new knowledge, and new assets to our organizations can go far beyond solving immediate problems.

Whether we're investing in rising leaders within our organizations or acquiring another enterprise that can help us fulfill our mission, we have to undertake an honest and transparent exploration to identify what we do best and where we need help. Then bringing along young, promising talent, turning to experts in narrow but applicable fields, and identifying partnerships that enhance what we already

excel at will help us create a true competitive advantage and build something permanent that can continue to grow.

Chapter 8: Act on Principles: Celebrating the Ageless Spirit through Applied Innovation, a Case Study

Of course, we will all be old one day. How would you want to be treated then? I'm guessing that how you wish to be treated one day in your future isn't different from how you want to be treated now. We live in a time of tremendous social change, one where people all around the world reject prejudicial behaviors. It is beyond time that this call for equity and social justice extends to seniors. Today, we can no longer see older people as irrelevant or dismiss them as having passed the time of their lives when they were vital to the larger cultural exchange.

The simple act of spending time with someone from a different generation is a powerful way to keep prejudice from forming, especially when you're young, which is exactly when most of our prejudices are formed. This can be educational at the same time it forges inter-generational relationships, as is the case in a partnership initiative formed between Revera, Inc., a leading owner, developer, investor and asset manager in the senior living sector; and Reel Youth, a Vancouver nonprofit that helps young Canadians tell stories through film. With the Age Is More Film Project, we have paired students with seniors in our retirement communities and have produced more than 280 short films that celebrate older Canadians and bring together what used to be the two solitudes of young and old.

Part 3: Humans Serving Humans: Realizing Excellence by Developing Cultures of Respect, Integrity, and Compassion

Chapter 9: Craft a Culture: Creating the Workplace That Would Make Our Parents Proud

Any organization is bettered when it takes advantage of the collective wisdom of its members. For me, central to creating an effective culture is to try to achieve one that is as non-hierarchical as possible, one that fosters a spirit of openness where people feel safe and comfortable and have confidence that they can ask questions and share ideas. I want a workplace where it is acceptable, even desirable, to ask your boss legitimate, tough questions.

The delicate balancing act is making sure that employees knowingly believe they are heard and supported while also creating an environment where everyone understands that decisions have to be made and then all must align with such decisions.

Because cultures typically take on the attributes of their leaders, as any quick survey of world history will remind you, the culture you desire is usually the one you'll get. Determine the three cultural attributes you want your business to actively reflect. Find out what personal behaviors are part of your own day-to-day interactions that you'd like to see others in your organization emulate. Finally, determine the type of mechanisms that are needed to make sure your people have the chance to have their ideas shared.

Chapter 10: Strive for Excellence: Achieving Perfection Is Impossible but Worth Attempting

Too often, people mistake attempting to achieve excellence with an expectation of perfection. While attempting perfection is a worthy goal, it is impossible to attain. Don't lower your standards, but accept that in the search for excellence, you're going to make mistakes.

Inculcate the ability to differentiate excellence from perfection in your culture. Start by transforming people's definition of failure. I'm not suggesting that we want to aspire to failure, but if you are taking risks, even calculated ones, occasional failure is inevitable.

Then eradicate blame culture while maintaining accountability. Your company will never be successful if it employs a blame culture. Instead, invest in those who own up to an error when they make it and who then get busy fixing the problem. Remember, good leaders always invite scrutiny, reflection, and discussion on how to avoid repeating mistakes.

When we create cultures of open communication and supported collaboration, people learn not to take things personally and work collectively. And the stronger the collective ownership of a project or strategy, the more colleagues will hold one another accountable. Lastly, remember that people are motivated by improving themselves, by improving the lives of others, and by contributing to lasting change. If we lead organizations that share those values, then our people will want to be part of moving the organization in a positive direction.

Chapter 11: Establish Equilibrium: Exceeding Expectations while Maintaining the Mission

At its core, a leader's role is to reduce risks and identify op-

portunities, which then enables us to be excellent allocators of financial and human capital. Too much focus on one aspect of the business and another suffers. To be successful as a leader, achieving equilibrium on multiple fronts is key. Maintaining equilibrium in a wide variety of responsibilities is both a skill a leader has to learn and a strategy for guiding our companies forward. The three central ideas of establishing equilibrium between profit and purpose include:

- Never lose sight of natural inquisitiveness and embrace courageous curiosity in learning new things about your business and the larger world.
- Apply innovation to find new solutions in order to take your business in new directions that are fitting for its strengths, consistent with its mission, and necessary for market demands
- Invest energy in cultivating a productive, desirable, respectful culture without your business that allows flexibility while creating stability.

The path to achieving each of these three elements is found in following our human instincts to do the right thing. Lean too exclusively toward purpose, and we may no longer have a sustainable business venture; lean too far toward profit, and we'll likely have a business that's not worth sustaining because it is morally corrupt. Some principles of applied equilibrium to employ during a time of crisis include:

- Balancing timeliness and informed decisions
- Balancing personal vision and an informed view
- Balancing getting it right and getting it done
- Balancing resources
- Balancing communication flow

- Balancing investment risk and reward
- Balancing growth and dividends
- Balancing innovation and infrastructure
- Balancing IQ (Intelligence Quotient) and EQ (Emotional Quotient)

Conclusion: Create Change by Making a Difference

It shouldn't take a pandemic to make us human. It shouldn't take observing courage and resiliency in the face of death to make us take stock of our values. It shouldn't take a crisis to remind a business about why it is in business in the first place.

The core principles I have outlined in this book have consistently guided my decisions and approaches throughout my career. If you're going to be able to create the kind of culture I've tried to illustrate within this book, it starts in one place: you must become comfortable in your own skin. You need to know who you are and know what you're good at while seeing where you need to learn.

No one ever suggested that guiding a company is easy. But the capacity you have to lead change in your company can also change lives for the better. That's a worthy goal. And remember, inside every challenge lies an opportunity.



For nearly 10 years, **Tom Wellner** has been the CEO of Revera Inc., a leading owner, developer, investor and asset manager in the senior living sector. Over his career, Tom has led with people and purpose at the centre of decision making, and he shares these philosophies and experiences in his first book *Leading with Humanity: How Purpose Creates Value*. He also contributed to the book *Unprecedented: Canada's Top CEOs on Leadership During the Pandemic*, sharing his experience at the helm of Canada's leading senior living organization during the pandemic in a frank and personal account.

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