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Balance Your Managerial Life

By Matthew Rekers, MBA

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We have only one life, but we live in three overlapping worlds—our business world, our family world, and our other social world. Imagine bringing your spouse and kids to a meeting with seven of your salespersonnel. Sitting off to your left, Miss Wright asks the question on the minds of all her fellow sales colleagues, "Why did you bring your family to our meeting today? Will they be playing any sort of role in our discussion?" You simply respond, "No, they're just here so I can tend to their needs."

Of course, this is a highly unlikely scenario. You don't bring your family into work with you every day. However, Heather Howitt does. Howitt, the CEO of Oregon Chai in Portland, Oregon, balances motherhood with her responsibility of running an eleven million dollar manufacturer of tea lattes. "Our office is a very casual place. We've got a family element going on here."

Living in the rain soaked city of Portland, 32-year-old Howitt often arrives at her office lightly splattered with mud. She often spends her lunch break taking her one-year-old son, Sawyer, to a nearby park, or to her nanny who takes him home. On other days, she simply places him in his crib in her office.

With the growth of her company, Howitt hired some key executives including a chief operating officer to manage operations and finance. She also delegated the sales calls that she used to make herself. "I used to come in at 6 a.m. and make calls nonstop," she explained. "I don't have to do that anymore." Howitt positioned herself in a way so that she is no longer personally over-worked or over-challenged by her daily responsibilities at the company. She balanced her business and private life. She not only recognized her strategic contribution to the success of Oregon Chai, but she also appreciates her unique role in the life of her young son.

As an entrepreneur or a business executive, you must give your best in two entirely different worlds. The needs of your business and the needs of your family and friends compete for your time and attention. And both expect the very best from you. Heather Howitt found one way to do it; you may have another way.

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To enjoy both the rewards of business success and family fulfillment, you need to constantly work to keep your balance. To successfully tackle the challenges of a fast-growing company, you need all the personal resources that come from a balanced life. "How do you develop a balanced business personality?"

Some entrepreneurial executives suffer from dangerous imbalance. Others achieve top excellence in maintaining optimal balance. "Early in my career, I use to think that entrepreneurship was more an art than a science, that it was a gift or something," says Cherrill Farnsworth. "I don't believe that anymore." Entrepreneurial leadership is not some automatic personality trait or some artistic talent some people are just born with and others happen to lack. Instead, entrepreneurial effectiveness with a balanced life is a dynamic process that you must constantly work at. If you don't keep developing and nurturing your entrepreneurial personality, it might just die. Then, only drastic action might revive that entrepreneurial spirit.

That's exactly what happened to Sam T. Goodner. His software company, the Austin-based Catapult Systems Corp., ranked 77th among the fastest growing companies in America while Goodner served as the founding CEO. At age 33, Goodner decided to step down as CEO of Catapult to take on the new challenge of serving as CEO of Inquisite Inc., a Catapult subsidiary that sells software over the Internet. But Goodner soon found his new digs to be "harsher, more spartan" than what he was accustomed to. "Half of it is actually under ground," he explained, describing his much less attractive new office space.

But Goodner was not complaining. After all, it was his own idea to leave the comfortable CEO position of Catapult with a staff of 115, to head Inquisite Inc., with only 20 employees. But now something was wrong. To be sure, there were plenty of challenges to attend to. The phone rang for his attention, paper kept filling the "in" box, and email messages steadily came in from employees, vendors, and customers. Every day, and every hour, urgent decisions had to be made, so much so that anyone in his shoes could have been overwhelmed by the "tyranny of the urgent."

But increasingly, he felt like he was only reacting to demands and not taking a visionary proactive role any longer. And too often, long hours of work would crowd out what he'd prefer to do in his home and personal life. Even worse, he realized that even if he could experience any gratification in his personal world, it could not make up for what was missing in his business world.

"I had none of my entrepreneurial creativity left," Goodner reflected. "I was falling back on what was easy. You know that's happening when you start just going through your email all day long." Recognizing that his former entrepreneurial spirit was gone, he resigned and hired a new CEO to head the company.

Perhaps Goodner had already achieved financial independence and had other worthy goals to pursue in life. In that case, relinquishing his CEO position could be the best decision to make. But could there have been another way to recover his entrepreneurial spirit with a healthy balance of attention to work, family, and friends?

Entrepreneurial functioning can range from the low level, "You are personally over worked and over

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challenged"—to the most desirable level, "You regularly implement action plans to improve every aspect of your life."

The lowest level of functioning leaves your company endangered. Top management is personally overworked and over challenged. The unrelenting urgent matters of your business seem to demand so much of your time that you go to work earlier and earlier, and stay later and later into the evening. You are like a runaway tire, rolling down a steep hill, turning faster and faster and faster until finally, you run out of control and then crash. "There must be a better way." And you are right! There is.

"Over the past three years, I've been able to identify gradually what things I can give to my CPA, or to my bookkeeper, or to my office manager. I read about people who work 60 or 90 hours a week and build multimillion-dollar businesses at the expense of their health and family. Those aren't success stories in my book. Success is having a multimillion-dollar business and the other stuff, too," says 40-year-old Tom Melaragno, founder of the \$7.6-million Compri Consulting, an IT consulting and staffing firm founded in 1992. Although he put in 12-hour days when he started the business, today he works just 8 or 9 hours and makes sure he's there to watch his two sons' Little League baseball games in the summer and coach the older one's football team in the fall.

Taking a proactive stance means you take control to invest your life wisely. Scott Tinley is an extraordinary triathlete who has competed in more than 350 triathlons including 19 Hawaii Ironman triathlons. The triathlon is an endurance sport involving swimming, bicycling, and running. Amazingly, Tinley has won nearly 100 races. "This sport is about a combination of personal challenge, camaraderie, and achievement of self-knowledge," Tinley explains.

Tinley is more than just an athlete; he is also a successful entrepreneur. He co-founded a company that produced athletic clothing—Tinley Performance Wear. He and his partners built the business over 8 years, reaching about \$10 million in sales. In 1992, they sold the company to Reebok. But even more than just being a triathlete and a wealthy businessman, Tinley is also appreciated as a writer, traveler, father, and husband. As productive as he is in many areas of life, he has not lost sight of the balance he needs.

Tinley explains the work-life balance he maintained over his 20-year career as an athlete, husband, father, and entrepreneur: "A lot of people have this image of self-management, that it means you have to drive yourself and force yourself to get things done without somebody looking over your shoulder. It is actually quite the opposite: You have to force yourself to have balance in your life and be efficient in all things you do."

He has recognized the importance of what he calls a "precarious balance between preparation, competition, professionalism, support systems, and the world of family, friends, and paying the rent." He has not lost sight of the fact that among the best things in life are family, friends, and a quiet run in the park.

This is the kind of balance that John Chambers, CEO of Cisco Systems has also achieved. An interviewer, asked, "What would you like to have accomplished and what's next after Cisco?"

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"The most important thing to me is my family, and that doesn't change. My wife of 25 years is a perfect balance for me. When I get down, which I occasionally do, she brings me up, and on rare occasions if I get a little bit too confident she brings me back down to earth too."

"I've got two kids I'm tremendously proud of and they are my life; so my family is first, second, and third in terms of my priorities. And when I'm at home, as my wife reminds me when I walk in the door, I'm not the CEO anymore. So at home, I'm like anybody else. Carrying out the garbage, changing the light bulbs, and so on."

Chambers illustrates how a proper balance between one's executive performance and other dimensions of life can contribute to both personal fulfillment and business success. An awareness of the need for balance has prompted many executives to make some crucial decisions in their day-to-day business and personal life that protected them from failure so they could just become an "enduring survivor."

But, no doubt, you want more from life than just maintaining a mere survivor level. You want to excel as an executive leader, and also thrive, not merely survive, in your personal life. So beyond the awareness that comes from self-assessment and evaluation of your priorities, there are additional steps to take in order to reach the top level of having all that life can offer.

Forty-year-old Mark Holland is the founder of a thriving company, Ascend HR Solutions. At the beginning of every workweek he pulls out a message that reads: "Wendi is the most important person

in my life. My family comes before work and other activities. I live my religion. I provide the financial security for my family. Our home is a retreat from the challenges of the world. I have a positive attitude, looking for and developing the strength in others. I help people develop and grow, including, when appropriate, holding them accountable. The outdoors provide a needed sanctuary and retreat for me."

Holland wrote this personal mission statement in 1998 following a major crisis in his business. That year the firm lost \$800,000, which caused significant problems in his partnership. Holland experienced so much stress that he lost nearly 20 pounds.

Then a business seminar inspired him to write down his life mission statement. Holland admits that the seminar gave him "a good smack upside the head." He resolved to never again sacrifice his family and health for the sake of his business.

Over a two-year period, Holland's personal mission statement grew into a life plan for himself and his wife. "We asked, 'What are the important things? What do we want to have happen before we die?'" Now they have a 30-year planned life itinerary on a spreadsheet that covers college savings, retirement, vacations, exercise regimens, relating to God and spiritual activities, work goals, personal growth, and personal relationships.

Holland constantly improved himself by regularly pursuing clear, written personal goals and life motto. Writing down your personal goals and a life motto not only helps you clarify the kind of balance you want to achieve, but also gives you a written reference to check week by week. Many people refine

their goals and motto over several year's time.

Mark Holland and his wife, Wendi take long walks together at least twice a week with their two-year-old daughter on Mark's shoulders and their five-month-old son snuggled in Wendi's front pack. Once a month, on one of those walks, they discuss and review their life plan thoroughly. "The plan is dynamic—it changes. It's been really good for getting our relationship and our lives back to where they needed to be," Holland says.

This practice of regularly reviewing their life plan indicates that Holland progressed to the highest level of functioning under balancing ones managerial life. At this top level, you constantly implement action plans to improve the balance of all five dimensions of your life.

Paul N. Howell, CEO of Howell Corporation, named an additional crucial characteristic of a successfully balanced entrepreneurial executive: "The willingness and demonstrated ability to conduct him—or herself—on a high moral and ethical level in both business and personal life. Without it, success is uncertain and short lived."

At the highest level, people who interact with you can see the sterling qualities of your servant leadership. Your executive actions are guided by clear plans that continually balance and rebalance all the dimensions of successful living:

1. Executive Success: Servant leadership, management skills, and career development.
2. Loving Relationships: Serving family, friends, and the needy.
3. Healthy Lifestyle: Regular exercise, good diet, and regular medical care.
4. Emotional Well-being: Stress management, recreation, and psychological stability.
5. Spiritual Maturity: Ethical character, commitment to ultimate values, peace with God, and devoting oneself to life's greatest spiritual priorities.

At this level, you regularly "retreat" from your usual executive responsibilities to rethink your personal mission, vision, and action plans. You deliberately make a continual concerted effort to maintain the delicate balance you need for a fulfilling life.

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What Balance Looks Like For You

By Angie Dixon

Recently, in an online group, we talked about "balance" and an article one member had read decrying the demise of balance altogether. We all had different ideas about what balance is and how to reach it, and I realized, after a number of posts, that we were all right.

I believe it is possible to "achieve balance in our lives." What I don't believe is that the way you create balance is going to match the way I create balance. I don't believe that dividing my time 50/50 or 25/25/25/25 is right for me, though it may be for you.

How do YOU create balance? Easy. Find times when you feel like things are going exactly as they should, that everything in your life is perfectly in alignment, and that you're doing what you need to do, when you need to do it. That's balance. Then "creating" balance becomes RE-creating it. Once you know what to do, you can do it again. And again.

When you're struggling to find what's next out of the middle of a dozen or more things, when everyone feels downhearted and discouraged because they're not getting enough of your time even though you're running between chores and family as fast as you can, you're not in balance.

Imagine your life as a series of circles, arranged around an inner circle. The inner circle is you. If you're just running the bases and touching each circle with your toe as you go by, you're not in balance. But if all those circles are close in to your inner circle, touching or overlapping not only you but each other, chances are you're in balance.

Balance comes when you're doing what you want to be doing, when it needs to be done. It's not about fifty percent of your time being home and fifty percent being work, or any other formula. It's about doing what is important at the time.

Angie Dixon helps small business owners get their acts together. She is a personal development coach specializing in helping people integrate their home and work lives so they feel less stretched and more balanced. Get her FREE EBOOK on balance at

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to discover how coaching can change your life, contact Angie at

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