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**Peter:** [00:00:28] Welcome to improv is no joke podcast, where it's all about becoming a more effective communicator by embracing the principles of improvisation. I'm your host Peter Margaritis, the self-proclaimed chief edutainment officer of my business, the Accidental Accountant. My goal is to provide you with thought provoking interviews with business leaders so you can become an effective improviser, which will lead to building stronger relationships with clients, customers, colleagues, and even your family. So let's start to show.

[music]

**Peter:** [00:00:59] Welcome to episode 54 and today's guest is Allen Lloyd, who's the new CEO of the Montana Society of CPA's and the former senior manager of the board of executive operations at the Ohio Society of CPA's. As Allen writes on his LinkedIn profile: "At the intersection of trust and getting things done is a group of people. I am one of them and have evolved from an administrative assistant to a senior manager working on projects critical to your organization's success." In this interview, you'll hear about the critical role Allen played at the Ohio Society of CPAs as a transition from the longtime CEO Clark Price to the new CEO Scott Wiley, which was a very interesting experience. Allen's ability to help in a smooth transition, both for the new CEO and the organization as a whole, catapulted him into a management role and now to the CEO of the Montana society of CPA's. This is a great opportunity for the members of the Montana Society CPA's to learn more about Allen's leadership style, as well as the accolades he gives to the leadership at the Ohio society of CPA's. I have some exciting news to share with my audience. Listen, Learn, and Earn. I've partnered with the American Association of CPAs and the Business Learning Institute to bring an exciting new learning opportunity for accounting professionals to earn CPE credits that starts on May 30th. You can earn up to 1 CPE credit for each completed podcast episode purchased for only \$29 through the MACPA and Business Learning Institute self-study website. The podcast episodes are mobile friendly. Open your browser on your smartphone tablet or computer, go to the CPA business learning institute self-study account, and listen to an episode. Take their review and final exam while you're working out or after listening to an episode on your commute to and from work. It's that easy. While all episodes of improv is no joke podcasts are available on my website, only those purchased through the MACPA BLI Self-study website are eligible for CPE credit. You can get detailed information by visiting my website at [www.PeterMargaritis.com](http://www.PeterMargaritis.com) and clicking on the graphic "Improv is no Joke for CPE" on my home page. I hope you enjoy his exciting and flexible new way of earning CPE credit. Remember you can subscribe to my podcast on [iTunes](#), [Stitcher](#), and [Google Play](#). If you'd like to purchase an autographed copy of my book *Improv is no Joke: Using Improvisation to Create Positive Results in Leadership and Life*, for \$14.99 with free shipping, please go to my website, [PeterMargaritis.com](http://PeterMargaritis.com), and you'll see the graphic on the homepage to purchase my book. Please allow 14 days for shipping. You can also follow me on social media. You can find me on [Facebook](#), [Twitter](#), [LinkedIn](#) or [Instagram](#). With that said, let's get to the interview with Allen Lloyd.

[music]

**Peter:** [00:04:29] Allen, welcome to my podcast. It's great to have you as a guest today. Thank you for taking time out of your busy schedule.

**Allen:** [00:04:36] Well thanks for having me. I am excited to be a guest today.

**Peter:** [00:04:39] Well I'm looking forward to your conversation because I know you've got a lot of interesting information to share with us, as well as some exciting news. But you know first and foremost why don't we start by you telling the audience who Allen Lloyd is.

**Allen:** [00:04:54] So Allen Lloyd is a guy who grew up in a small town on the Ohio River, moved out to Columbus to go to Otterbein College, which is now Otterbein University. I always wonder, when you're your higher education name changes, do you change or you stay with whatever it was when you were there.

**Peter:** [00:05:15] Good question. Good question.

**Allen:** [00:05:18] When I graduated from college, one of my friends from college her mom hired me to work at the Huntington bank, where for three years I'd process car loans and leases. So you go to go to the dealership. you buy a car, you fill out the paperwork, the dealer would get most of the numbers correct. We would then go in and I would type the numbers. I think, looking back, that led me to a lot of my ideas because of the first meeting I had with our director level person I asked her why I had a job and it didn't seem to make sense because all we were doing was typing numbers from a scanned image into the software. The recognition should be able to recognize those numbers and do our job for us. I don't know that she appreciated the fact that I questioned whether whether my job should have existed.

**Peter:** [00:06:11] [laughs]

**Allen:** [00:06:11] But as you look at automation going forward, it's something that you know has taken hold. And so I was thinking about that long long ago. After that I spent a couple of years working at a place called Sky Financial Solutions doing compliance work there as well. We did loans for dental practices, which interesting fact there: Dentists are second behind your funeral homes as the least likely businesses to go under. Very safe to lead to people who are opening a dental practice. After a while, I get tired of working compliance and started looking for other opportunity, and that is when I stumbled upon the accounting profession. I started working at a regional accounting firm called Norman Jones Enlow. I started there as the executive assistant to the partners. We had, I believe, six partners at that point. One of the interesting things about that time was, of the six partners, I think half of them had been managing partners of their own firms and then over time they came together to be this firm. So where we had one managing partner we had three people who had, at some point, been a managing partner. So those personalities and ideas were always fun to balance. After six years there, I spent two years in the government working in the Mid Ohio Regional Planning Commission. That is where I got my first taste of association and membership types of organizations. MORPC is an organization where your local municipalities are members. They come together to talk about how they can make the region collectively better. And then, after a couple of years there, I saw an opening at

the Ohio society the executive assistant to the CEO, who at that point was Clark Price. And I remember from my time working at the accounting firm that I just had spectacular service from the Ohio Society of CPAs, and the idea of being able to work in a place where I knew there was a very high level of work being done that was very appealing to me. At that time, when I interviewed, one of the things Clark told me was you're going to take this job but I'm retiring in X number of days, and that was around two years before he retired. But even at that point, he knew the exact number of days he had left. And one of those that drew me to this opportunity was also the fact that I would be able to manage that transition. And you know, as an executive assistant, you look for diverse experience so that you're more marketable moving forward. And I thought "wow, managing a transition from one CEO to the next is going to look great on a resume." So then we hired Scott Wiley and I was his assistant for almost a year, and he and I sat down to have lunch one day and he looked across the table and he said "Allen, I think you can do more." And my initial thought was man, I was busting my hump for this guy. I can't believe he's asking me to do more work. And when I said that, he laughed for a moment and then he said, "No no no no. I think you've got potential to do more than just be my assistant." And at that point I took over managing our number retention and our membership drive. I learned a great deal doing that for a couple of years, and then the Ohio society had an opening where the software we used to manage the organization was going through a reimplementation, and our CIO and just left to become the CEO down at the South Carolina Society of CPAs. And so I spent a couple of years working on that project, which got me into the weeds across the organization and really helped prepare me for the next chapter. On June 12th, I will start work at the Montana Society of CPAs as their executive director. So it's been a long, strange road to get to this point, but I think you know, as we talked, I think a lot of it came from being willing to improvise and to go into situations where I might not have known the answer beforehand, but I was willing to try things and figure it out and make sure that I learned as I was doing it.

**Peter:** [00:11:03] That's a great history that you have. You have a lot of different variety in your background and you and I met when you came to work at the Ohio Society. I think that was the year that I was chair of the board of directors. And we've known each other ever since. And when I heard the news that you were leaving for Montana I was really excited for you... But also went "It's Montana." It's way way west and it's beautiful country, but it's... I mean you've you've grown up in the central Ohio area.

**Allen:** [00:11:40] Well I grew up down on the Ohio River in a speck on the map called Clarrington, Ohio. When I grew up there, I think the population was 350 people. If you went there today I think they're struggling to have 200 people. So rural areas are no new territory to me, and I think another great thing about Montana is just the beauty out there.

**Peter:** [00:12:07] Yeah.

**Allen:** [00:12:08] Where the Society for CPA's is located is right up next to the Rocky Mountains. Mount Helena is there. It's not Mt. Saint Helens, that's one you don't want to live by.

**Peter:** [00:12:19] It's in Washington State.

**Allen:** [00:12:22] But Mount Helen is just there and I mean the recreation opportunities there are amazing. And that's one of the things that drew me to this opportunity. The other is the fact that Jean and the staff out there built a great organization. Their volunteers out there are top

notch and look forward to there are some places where you can go and you would be instantly into a rebuilding phase. That is not the case here. You know what I'm looking for the most is getting out there and meeting the members and learning the two most important things: What keeps you up at night and what gets you out of bed in the morning.

**Peter:** [00:13:04] Yeah.

**Allen:** [00:13:05] One of the things I'm worried about is how can the society help you overcome those? But also you know what excites you about the profession? I mean everybody should have something about their career and their job to get them out of the bed in the morning. You know what are those things? How can we help you do more of that?

**Peter:** [00:13:21] Well you mentioned one of my favorite staff CPE directors in the CPA profession, Jean Reiden. I've known Jean for a long time. Absolutely love her. You've got a great person out there to help you. I think the world of her and the two of you guys are just going to have so much fun together. She's a great lady. And Jean I know you're going to listen to this and I'm not just sucking up. I mean it wholeheartedly. And please take care of Allen for us. He's a good guy. He's a really good guy. You get a good steal out of Ohio society. So let's back up a bit. When you took the role at the Ohio society, you were six years at a firm. So the thing that you had mentioned about being at the firm... so it sounded like through acquisition, it went from Norman Jones to Norman Jones Enlow and company through acquisition, and you've got all these people who were managing partners of their old firm coming together to run one firm together. Between the Eagles and the personalities and stuff, that had an interesting period of time and I think you used the word balance.

**Allen:** [00:14:37] So one of the interesting things there was you know with different partners they had been acquired before I arrived and so they had some history of working together. Well the really interesting turn came when we had a board meeting, and the board meeting will be you know the six partners and myself in the room, and in the beginning my role was just to take minutes and capture what was said and what was decided so then later as you're trying to implement things you can go back and say this is what you guys just said. Over time, as I learned the business, I got to have more participation in the meeting and oftentimes it would come down to them having some ideas about what we wanted to do. But knowing that in the end a lot of that administrative work was going to fall on my shoulders and I had more of the practical knowledge and the ability to think about how to actually implement these things. The one that sticks out to me is we had a mentoring program that we put in place while I was there and you know the partners had this great idea. You know we have some staff that we saw potential to be the next generation of you know partners and managing partner for the firm, but we realized that we didn't have a good way to groom them for what it was really like to be a partner. And so in those conversations I got to you know do some research and find out what others were doing and then bring forward a plan that we were able to implement. And then looking back... Andy Cohen was our managing partner at that time and when he retired, me and someone else became the managing partner for a while now. Now Michelle Roseberry is the managing partner for the office Hill-Burton King bought Norman Jones. I think about two years ago. But it's interesting to look back and say you know both Nancy and Michelle were in that group and went through the mentoring program. So that was something that we devised and, looking back, it had a real big impact. I'm sure that the work they did with their mentor helped them be successful in that role. So things like that were very - it wasn't something that I had any

training on. It was something that I learned about and was able to implement through you know their trust and knowing that I understood the business and what they needed at that time.

**Peter:** [00:17:05] That's a great comment about you understood the business because, at that point in time, you were really a trusted business advisor for the firm.

**Allen:** [00:17:16] Correct. Throughout my career, one of my strengths has been the fact that no matter where I am I'd like to learn you know how the organization really works. You know there are a lot of things that are theoretical and you can say well you know this person manages this and that's. But I like to get to know how things actually work and the nuts and bolts of the thing because I think that's how we learn you know to be a leader. And one of the things and I learned very early in my career is that a title isn't leadership. Leadership is an attitude. I try to always have that leadership attitude to try and help the people that I was supporting do a better job. And that's one of the things that I'm probably most proud of in my career is the fact that I think I've done a pretty good job of that.

**Peter:** [00:18:06] That's really cool that you've looked at it as an attitude versus I mean this authority type of position because I just finished watching this video - an interview with Simon Sinek - "Be a Great Leader: How to inspire others to do remarkable things." And he gave his definition of leadership, which I absolutely loved. It kind of encapsulated what you just said. He said "Leadership is the practice of putting the lives of others ahead of our own interests."

**Allen:** [00:18:38] Yeah. That's perfect. I love that.

**Peter:** [00:18:39] Yeah. I thought it was great. And that's true leadership. I mean just because you're in a position of authority you might lead by authority, but that does not make a leader. And I love that story. It's weird that I just watched this video today because he goes on the talk about you know a leader doesn't have to be the person who's running an organization. Being a leader is, whether you're a worker bee or at what level, is helping the person next to you. That's leadership.

**Allen:** [00:19:17] Yeah. It's the whole concept of a servant leader.

**Peter:** [00:19:19] Bingo.

**Allen:** [00:19:20] You can do more things by empowering others and giving them the tools they need than you're ever going to be able to do by yourself.

**Peter:** [00:19:30] Bingo. That's right. And that's what leadership, in my definition, is. And I haven't seen it quite phrased that way but I absolutely love it. And the other thing he was talking about that leader is get the culture. Get the culture right because he states "when we get the environment right, humans will do remarkable things." You can take a a good person and put them in a bad environment and, ultimately, they'll maybe become bad. But you can take a bad person and put them in a good environment and, you know what, they'll end up doing, for the most part, the right thing. And it's really the culture that you build. And I think that would be one of the most exciting things about going into this role that you are. There's a culture there but it doesn't have the Allen Lloyd spin on it.

**Allen:** [00:20:18] And you know that's one of the exciting things. Knowing that you have a good team in place and that you know a group of people interviewed you and have trusted you now to lead that group... that's a huge responsibility and I look forward to you know both finding how I fit in with them and how they can grow with me. One of the big things in the interview process was I'm a firm believer that when you interview for a job the number one goal should be to be yourself. If you are yourself in an interview then, if you get the job, you can continue to be yourself. If you put on some facade in order to answer the question the way you think that people want to hear answers, you're setting yourself up to need to be something else that you work or not. And during the interview process I was you know I try to be crystal clear that no I don't have all the answers but I know how to ask the right questions and I trust that the folks around me are going to help me grow into this. And so this is something where, as a team, we're all going to have to learn to trust each other and grow and that is just unbelievably exciting to me.

**Peter:** [00:21:36] And you've had the opportunity to work under one of my favorite leaders and I call them a friend and a mentor. Your time that you spent with Clark.

**Allen:** [00:21:48] Yes. Clark was and will forever be, in my book, one of those people that exemplifies leadership, and what I loved about working with Clark is you got to watch how he adapted his leadership style to his audience. And it was amazing to watch him work with different people that needed to be motivated in different ways. And it was very interesting then, over time, to look back and think oh man he was doing that to all those other people. How is he doing that to me?

**Peter:** [00:22:23] [laughs]

**Allen:** [00:22:23] And you know you start thinking about yourself and you're like wow. He recognized something and developed it in me without me even knowing it was happening.

**Peter:** [00:22:33] That's cool.

**Allen:** [00:22:35] And I think that's remarkable. And you know it's also been interesting. You know the transition between Clark and Scott was, from an organization standpoint, very very interesting. You got to see... Clark and Scott are two very different people. But when you get down to the core, they're both very similar in what they're trying to do. It's been interesting to see how people adapt to the different styles of the two of them.

**Peter:** [00:23:02] And how is that - That was one of my questions. During this transition you've got Clark, who's been to society for, what was it, 25-30 years as the CEO, plus his time before that. He's been there for like 40 years. I mean those are some big shoes to fill. I mean that's like you know I had a fall Bear Bryant. Are you kidding me? I have to follow Adolf Rupp? I got to follow Nick Saban? Using bad sports analogies. And the leadership styles, as you said, they're very different. How was that transition going from Clark to Scott?

**Allen:** [00:23:36] So you know I think two things really helped in that process. The first was Clark stepped down in a very deliberate way and he wanted to set Scott up for as much success as possible. And we didn't have a long time where the two of them were both in the office and we didn't know you know who was running the show. Clark had been out for two months and

Laura and I actually had one board meeting in that interim period, which was I believe I think Laura would agree with me, it was very interesting for us to hold a board meeting with a CEO. And then when Scott came on, Scott was very deliberate. He was deliberate in what he did and stayed true to who he is. And it took us a while to come to terms with who Scott was and what that meant for each of us. And looking back you know we had some people that left. We had some new people that came on. And the culture has changed even though you know we still have some of the same people around. It's been a very interesting trip to go on.

**Peter:** [00:24:52] I can imagine. The other piece about the Ohio society, over the years, is that it's been an incubator for future CEOs, as Boyd Search left and he's in Georgia, Chris Jenkins is in South Carolina, you're now in Montana. So whether it was Clark and Scott, they have really cultivated that next generation of state CPA society leaders.

**Allen:** [00:25:19] And it's one of those things where you know listening to you rattle off all of our names... it is impressive, but also I think about the process that we all went through... One of the things that Clark and Scott share in that they really want to grow the talent that they have. I think both of them have invested in us to get us to the point where we have the potential to do this. And the other person - I'd be remiss if I didn't know their name again. Laura, our executive vice president, Laura Hay. She's done an excellent job of coaching us, as well, because I believe that you know if you talk to all three of us, we all worked directly with Laura. She's another one that, when you look back at your time with Laura, you realize that she may have directed you to do something and taught you some things that you didn't realize you were learning at the time. But when you look back on it, in hindsight, sometimes you look back and go holy cow. We had this conversation that I kind of wrote off but it's stuck in the back of my head and it changed how I act on a daily basis, and it's things like that... You know, as I go to the next chapter in my career, that's something that I hope I can develop as a person and use the same tactics and ways to grow my staff. And hopefully they'll help grow me in the same way, because I think that's important. I think the thing that I'd like to touch on about this that our volunteers leaders have been great too. When I started at the Ohio society, you were our chair. And you know just thinking back to all of the great people that have been chairs since I've been here. It's very interesting to see the different personalities come up and be able to hold that room and run the meetings and get all the board members involved in the decision making process. That's been very interesting. I look forward to you know continuing that in Montana and seeing how we can take people with different leadership styles and leverage and to grow the organization.

**Peter:** [00:27:39] Yeah the chair now is Bill Chorba. He was on my board and I immediately recognized that this guy was going to be chair someday. I took him aside and said "Bill, you know you're going to be chair some day." He's a great guy. That's only one, after I left, that I knew directly. And Bill's got great leadership skills and he's the guy that I - I would love to watch him in action because I know I could learn some stuff from Bill. I believe he's that good.

**Allen:** [00:28:16] If I had to sum Bill up in one word I'd say passion. It is amazing the passion that he brings to the profession and to his life and everything he's involved with. When you have with Bill, he just beams about things. And I think there is an energy that you get from that that energizes the whole room. I can't say enough about Bill Bill. Bill is fantastic.

**Peter:** [00:28:42] He is a really good guy. And I think at one point some years ago he was named the greater Cleveland area CFO of the year.

**Allen:** [00:28:53] Mhm.

**Peter:** [00:28:54] And they don't just hand those out at the street corner.

**Allen:** [00:28:58] No.

**Peter:** [00:28:59] So you've gone through this transition. You've had some great mentors. You've had some great leaders to... not so much be like, but to take some of their tips and talents and stuff to build it into yours. And now you're off to Montana. What's your first 100 days going to look like Allen?

**Allen:** [00:29:22] It's funny you ask that because one of the last questions they asked me in the interview was, I don't remember if they said 100 or 50 days in, what should we expect? My answer to them was don't expect you know any huge change in the first hundred days. But what I hope I will bring to the table is you know some questions so that we collectively learn some new things. We might not be taking action on those things, but I at the very least hope that, together, through our discussions and from going out and meeting the members, that we'll learn something that we didn't know before and then we can take those back and think how can we use what we have learned together to grow this organization and to make it successful?

**Peter:** [00:30:13] That's great. And what was their response to that comment?

**Allen:** [00:30:18] You know the room erupted in applause. I got a standing ovation and I just you know I dropped the mic and I left the room.

**Peter:** [00:30:28] Haha! Mic drop.

**Allen:** [00:30:30] The group that interviewed me appreciated that answer. I think going back to interviewing and being yourself, that's who I am as a person. I don't like to make grand promises on things that I can't deliver, and I like to set the table of "I'm going to try and get you to think about things a little bit differently," and I think that's something that I have historically done very well and I look forward to doing that in the future. I'm never the smartest guy in the room, although right now I'm by myself so I guess by default...

**Peter:** [00:31:04] [laughs]

**Allen:** [00:31:04] But I always like to ask questions because a lot of times the other people in the room might have the same question, and they're for some reason not going to ask it. I've never been timid about asking questions because I think that that drives conversation. As you learn about things, you grow, and sometimes by answering a simple question that somebody has, you're answering it will cause you to think about it differently.

**Peter:** [00:31:32] Exactly yeah. And I think a lot of people are afraid to ask questions because they think they're going to ask a stupid question. But as I always say, what's a stupid question? The one that's never asked.

**Allen:** [00:31:43] Exactly.



**Peter:** [00:31:44] So that's a great leadership skill right there: the ability to ask questions and then listen to everybody's input or comments or ideas, and then formulate some type of plan from that.

**Allen:** [00:31:58] I mean you just broke it down in a nutshell. It's a very simple concept but, in practice, it's very difficult to do. One of the hardest things for us to do today is listen I'm sitting here and I'm looking at a phone and I see my cell phone over there and I see my e-mail in front of me as well. And it's very difficult not to let these things distract you. So it's important to be an active listener and to try and not think about what you're going to say next but really absorb what you're hearing. Really, I think, as a society, we've made it really difficult to do that with technology and the two-second news cycle that we're living in today. It makes some of those things more difficult than it has been in the past.

**Peter:** [00:32:46] Well as I think you remember... I don't know if we did this or not at the time, but when I did that workshop for the CPAFMA - the group improv thing - I spend a lot of time teaching about listening and the value of truly parking your agenda, listening to understand, that that act of listening. And then, after the person is done, having that response. I was in Nebraska last year speaking at the fall conference. It had 400 days in the room and I was doing a similar type of presentation about Improv is no joke, about leadership, and I had this group play this game called last word spoken. And what it is is one person - they're paired up in twos - and one person would start a conversation. I said, whatever it is, just start a conversation. When you end, that last word that you say is the first word the next person uses in their next sentence. And then when they're done that last word comes back to you. And I do that exercise just for the fact of teaching. A lot of times when we interrupt, or a lot of times we get distracted in our head, some of those last words that are spoken are some of the most important parts of that conversation and we miss out on them. Because, in improv, you know if I'm not totally listening to my ensemble that I have with me, I'm going to miss it. So I've got to listen to those very last words. And this gentleman who was in the audience - he was CEO of a manufacturing plant in Endicott, Nebraska. He contacted me a few days later and said he absolutely loved it. He took it home and he was playing with his kids and invited me to come out to work with their sales team at the national sales conference last October. And you might want to try this with your team. You want to give a real quick shot on this episode? Play this game?

**Allen:** [00:34:47] Definitely.

**Peter:** [00:34:48] You want to start or me?

**Allen:** [00:34:49] You start and then I will follow.

**Peter:** [00:34:51] Follow is something that leaders are good at getting people to do is to follow them.

**Allen:** [00:35:00] Them trees are growing outside.

**Peter:** [00:35:04] Outside is where I'd rather be right now because the sun is shining.

**Allen:** [00:35:08] Shining praise on your people is a very important thing to do as a leader.

**Peter:** [00:35:14] Leader, if you dissect it, is it lead or is it lead?

**Allen:** [00:35:20] Lead paint is a terrible problem in older homes.

**Peter:** [00:35:25] Homes... isn't that a Mexican word? So you see, you've got to take that last word and play with it. It can be a lot of fun, but it also helps teach that piece of active listening because you can't get ahead of yourself, and a lot of times we do.

**Allen:** [00:35:42] And as we were playing that game you know the other thing that struck me is there was a bigger pause there, every time. And I think in today's society a lot of times there's a lack of silence, and just being willing to let the room be silent for a second so that people can think and not worry about just filling the air with words just so that there's something making noise. You know I think that's a that's a big thing that happens today. We hear an empty room and we just start talking, but we don't really have anything to say.

**Peter:** [00:36:17] That is a very interesting observation because you've made me think about something different. Usually in that game I tell people not to think and just react.

**Allen:** [00:36:28] [laughs]

**Peter:** [00:36:29] Just hear the last word take it and run with it. But you've just added another dimension to it because I thoroughly agree 110 percent that that pause for a moment in a conversation with somebody - that pause, actually, the other person is realizing that you've actually listened to them and you're thinking about it. And the respect level for you has now increased versus just immediately coming back with something like you said: just filling in the room with words.

**Allen:** [00:37:00] Yeah. And I'll tell another short story here that I often tell when I'm on the phone and somebody can't see me.

**Peter:** [00:37:07] [laughs]

**Allen:** [00:37:07] I'm sitting nodding head up and down and that's something that I do unconsciously - subconsciously, in my head. I didn't realize that I did it until my grandfather passed away and I'm sitting there and you know the preacher is talking about my grandfather and all these things that he did. And one of the things that he mentioned was, when he was giving a sermon, he always knew if the sermon was a good sermon - he could look out and my grandfather's head would slowly be going up and down. But if my grandfather didn't necessarily agree with what the preacher was saying, his head would shake side to side. And, as the preacher was saying this, I noticed that my head was going up and down and I started thinking about it and realizing that just in life in general that's something that I now look back and I remember my grandfather doing. And it's something that I do constantly and, as I catch myself, it's one of those things that it's a pleasant reminder of my grandfather, for one, but it's another one of those ways that I've become accustomed to realizing that you know if my head is shaking side to side, there's something not right there. I might not consciously know what's not right, but at those moments I typically, if I catch myself, that's when I go into asking questions mode to try

and figure out what's going on there. And it's one of tells. You know I'm a terrible poker player because I have all the little things that I do that are terrible tells, but that's a tell that I'm proud of.

**Peter:** [00:38:51] Yeah. And as someone who speaks before audiences, I do look for that - those who are nodding their head, hopefully up and down versus back and forth. Because you know that's also - you know that body language that your audience needs to see in order to... And if you see maybe one person out of a hundred do it, but if you start seeing more and more doing that same type of body movement you know either they're agreeing with you or they're disagreeing and you need to address the issue in the room to find out what's the disagreement about; what aren't they agreeing with versus putting blinders on and just getting to the end of this thing.

**Allen:** [00:39:35] And you know you talk about speaking and that's one of the skills that I've developed over the past six years. Before I started at the Ohio Society, I don't know that I can remember the last time I gave a presentation in front of a group of people. But at the Ohio society, we were always looking for people at the accounting shows to fill in and do things. And over the past years I've started you know trying to do a different presentation every year. And it's always interesting to you know develop a presentation and think through it. But then the first time you give that presentation and look out in the room and see whether it works or not. And one presentation that I gave last year is called Life Hack. Life Hack is essentially improv with technology, or some concept. You know you take something that can do A and you think about oh, I can solve problem B with that as well. And giving those presentations... it was really obvious some things stuck with people and other things people didn't really buy into. So it was interesting that, as that presentation evolved over time, I slowly got rid of those things where looking at the audience you see people you know disagreeing or being confused. And that was very helpful in developing that into something that you know turned out to be pretty good presentation, in the end.

**Peter:** [00:41:02] Well you just used an improv skill called co-create. You're having your audience help create your presentation from the feedback that they're giving.

**Allen:** [00:41:11] Now that I think about it, I think every time I've ever given that presentation somebody has walked up to me at the end of the presentation and given me one of their life hacks. And that is just - I love that. I can't think of a name on top of my head, but there was somebody that went to that session down in Cincinnati and I think for the next six months he and I emailed back and forth about once a week with some neat little trick that we had thought of. It was one of those things where you know you connect with a like-minded person and the things you can develop together are just amazing.

**Peter:** [00:41:47] Yes, and... Yes, and that's improv - and that's the fun part of it. It's not making stuff up, but it's going into a room with nothing but walking out with something because you collaborated on an idea. you are open to suggestions, you're open to ideas. And I think that's another quality that great leaders have: they're open to everybody's idea, and in improv we say "bring a brick, don't bring a cathedral."

**Allen:** [00:42:17] Yep.

**Peter:** [00:42:17] Because the cathedral is I've already got the agenda. You're just talking and I've already made up my mind so I don't really care about your idea, but if you bring a brick we can build our cathedral; we can build the Parthenon; we can do all of that stuff... but don't come into it without being so set on your agenda that you won't listen to somebody else's ideas.

**Allen:** [00:42:40] You know it's funny. One of the other things that I've always been a big believer in is that I tend to be an introverted person, and what I learned is part of that means that if you put me in a room and you throw a new idea at me, typically, on the spot, I am not going to be able to digest it and come up with my own bent on it. But if you give me an idea beforehand and you let me think about it a little bit, I tend to come up with some good thoughts. And then I think, at that point, I feel far more comfortable coming into a room with a bunch of other people that have thought about this and sharing and building on it. And so that's one of the things I always like to try and do whenever I'm working with a committee or a group - to be very clear about hey we're going to talk about this topic. At least think about it a little bit beforehand. You know you don't have to write a 10 page paper, but giving people that think the way I do an opportunity to do that I think is huge.

**Peter:** [00:43:40] It is. It really is. It goes a long way in implementing anything. And always knowing that you know we can overanalyze at times, and you know when we put something in play we know that we may not have thought of everything. That's fine, but to build to say OK we didn't think about that... Now we just need to adapt, fix, move forward versus now we're going to cast blame on you because this didn't go 100 percent the way you had planned it. Nobody's going to come to the table with any new ideas. When we're visionary, when we're looking at the future, when we're trying to do something as a group to move an organization forward, we can't see everything. That's another piece about improv: accepting failure as a learning process, a growing process, is a heck of a lot more powerful than not accepting failure and using that as a bashing tool.

**Allen:** [00:44:42] I couldn't agree more. One of the things that, looking back in my career, has helped me, and I think it helped me build trust with a lot of different types of leaders, is being willing to come forward and say hey I screwed that up.

**Peter:** [00:44:57] [laughs]

**Allen:** [00:44:57] That is a mess that I caused.

**Peter:** [00:45:00] Yeah.

**Allen:** [00:45:00] And you'd be amazed at the number of times you'll come across people that don't want to be open about their mistakes because they have this fear, and then what ends up happening is the mistake's going to bubble up. People are going to learn about the mistake one way or another. Typically, if you come forward with the mistake, people are going to be far more understanding than if they discovered it themselves and figure out that it was your problem. I can think of a solid six examples just off the top of my head where I walked into you know Scott or Clark's office and said "you know we did this. It was my decision to make. And it was terrible. We have to call some members and apologize." But that is far better than having one of those members call you know the CEO themselves say "hey you're your team is screwing this up pretty bad." And I think that builds trust. Then, you know, I think where that's most helpful is

when something is screwed up and you didn't have anything to do with it. You know it's clear people know that, if you messed it up, you're going to come and own it before anybody else.

**Peter:** [00:46:12] Exactly. It's that accountability. Plus the cover up is always worse than the actual mistake itself.

**Allen:** [00:46:18] And we all have the same tendency. You always think in your head "oh my god. I'm going to tell them that this mistake happened and it was my fault and they're just going to fire me right now.

**Peter:** [00:46:27] Yeah.

**Allen:** [00:46:28] You build it up in your head and then sometimes, yeah, you might have done something that terrible, but that is incredibly rare. And so just the act of going and admitting that you did something wrong is important, but I think the flip side of that is you have to also learn. If you're making the same mistake over and over again... you know I don't want to go in to Scott and say "hey remember how I screwed that up last year? Yeah I did that same thing again."

**Peter:** [00:47:00] Yeah.

**Allen:** [00:47:01] So I think it's important that, as somebody develops and grows yourself, don't make those same mistakes over and over again.

**Peter:** [00:47:10] Allen, you're going to be wildly successful out in Montana. This has been a wonderful conversation. You know and I'm looking forward because I'm going to be out there on June 22nd speaking at your annual meeting, so it'll be great to... you'll be a seasoned individual within that organization because you've been there what a whole maybe 10 days by that point in time?

**Allen:** [00:47:33] Exactly.

**Peter:** [00:47:33] Exactly. You'll have it all figured out. But I'm, one, sad to see you leave and I have to ask this question: did you sell the Miata?.

**Allen:** [00:47:45] Yeah. The Miata has been sold. And just today... it's amazing. People have this concept that you have a car and they put a dollar value on a car. But a Miata - and people are blown away by this - I have people ask me all the time "like oh man I wish I could have a Miata." You know they're like \$2-3,000? Just buy one. If it falls apart, oh well. You know the Miata is the poster child for value. You buy a first generation car with pop up headlights... I think they pop up two or three times and you've gotten \$2000 of joy out of it.

**Peter:** [00:48:25] [laughs] Well as you know I have and I have a 92 Miata that was a divorce present to myself that I still own and I don't know how you sold your car. I think if I if I went to Montana I'd have to drag mine with me. I've got way too much of an emotional attachment. That that car helped me out a whole lot during the early days of that divorce and I just I absolutely love to drive that car, especially this time of year with the top down just driving around. I just get so much joy out of that. Somebody could offer me two or three times the amount and I don't think I could sell it. But well you did say that you are, since you're out in big sky country, that you

thought that maybe you and your family would pick up skiing again and I think you said you do like to mountain bike, so you're moving that energies from the Miata into mountain biking. Is that correct?

**Allen:** [00:49:20] That is correct. And also the money from the Miata went directly to a bike shop for new bicycles.

**Peter:** [00:49:26] Perfect. Well you're going to be wildly successful. I know it. I'm looking forward to seeing you on the 22nd. And Jean, I know you're hopefully still listening, take good care of him. He's a really great guy. Allen, I appreciate the conversation. Absolutely loved it. Thank you for being a guest.

**Allen:** [00:49:45] Thank you, Pete.

[music]

**Peter:** [00:49:49] I'd like to thank Allen again for spending time with me and sharing his thoughts on his experiences and his leadership insights. In episode 55, I interviewed Cody Boyce, who's the founder of Podcast Masters, who are the producers of my podcast. I've had a number of my guests and listeners ask me a lot of questions about starting a podcast, as well as give a lot of praise to the behind the scenes work of Podcast Masters. So it's fitting that we pull the curtain back and talk to the Wizard of podcasts. Thank you again for listening and remember to use the principles of improvisation to help you become a better leader.

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