

Roxanne Kaufman-Elliott: [00:00:00] Probably, the most important thing in the entire universe in our entire existence as human beings is to encourage the heart.

Intro: [00:00:18] Welcome to Change Your Mindset podcast, formerly known as Improv is No Joke, where it's all about believing that strong communication skills are the best way in delivering your technical accounting knowledge and growing your business. An effective way of building stronger communication skills is by embracing the principles of applied improvisation. Your host is Peter Margaritis, CPA a.k.a. The Accidental Accountant. And he will interview financial professionals and business leaders to find their secret in building stronger relationships with their clients, customers, associates, and peers. All the while, growing their businesses. So, let's start the show.

Peter Margaritis: [00:01:03] Leadership. What is it? You can recognize it when you see it, both good and bad. Are leaders born or can this be a learned skill? How does one learn how to become a leader? Does one become a leader by reading leadership books and attending leadership seminars and workshops? How do you get people to follow you and follow your vision? How do you motivate and inspire others? How do you adapt your leadership style to current times? Should leaders ever say that they've made a mistake?

Well, those questions and many more will be answered by my guest, Roxanne Kaufman-Elliott, who's the founder of Roxanne Leadership powered by Pro Laureate. Roxanne is a warm, down to earth, authentic, sometimes, quite funny, and deeply dedicated to helping others become the best of themselves. She is passionate about unleashing the leader in others. She's dedicated to helping people and organizations create cultures, lives, and legacies of genuine and authentic leadership and success.

And she's committed to sharing every bit of her depth and breadth of experience, excellence, knowledge, and caring to everyone she meets. She's a highly respected and sought-after speaker, presenter and published author. A certified master, executive coach, and facilitator in both the Leadership Challenge and i3 Transformational Leadership. Founder, facilitator, and coach of, by invitation only, Personal and Professional Leadership and Legacy Development Retreat, Grace and Grit, The Elite Retreat.

And an award-winning business and marketing strategist. With over 30 years of national and international corporate experience, Roxanne works with clients ranging from privately held businesses to corporations in manufacturing, health care, insurance, accounting, financial services, real estate, consumer products, and construction to industries as well as many others. Now, I'm at a front seat on watching Roxanne's leadership style because she's the president elect of the National Speakers Association, Ohio chapter. And I'm the immediate past president and current treasurer.

She's also have been on the board of many other nonprofits during her career. She loves what she does and you can feel her passion throughout the entire interview. As you know by now, Change Your Mindset is part of the C-Suite Radio family of podcasts. It's an honor and privilege to be amongst some of the more prevalent business podcasts, such as The Hero Factor with Jeffrey Hayzlett, Amazing Business Radio with Shep Hyken, and Keep Leading

with my friend, Eddie Turner. You can find Change Your Mindset and many other outstanding business podcasts on C-Suite Radio by going to www.c-suiteradio.com.

Announcer: [00:04:07] This podcast is part of the C-Suite Radio network: turning the volume up on business.

Peter Margaritis: [00:04:14] And now, a word from our sponsor.

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Peter Margaritis: [00:05:02] Now, let's get to the interview with Roxanne. Hey, welcome back, everybody. My guest today is, I must say, one of the leading authorities in leadership. She won't give herself that credit, but when you hear her story, you hear what she has done and accomplished. And when she talks about her clients, they're not just little clients, they're multi-million-dollar companies that she's helping to coach and do many things around the leadership space. So, without further ado, first and foremost, my guest today is Ms. Roxanne Kaufman-Elliott. And thank you so very much, Roxanne, for taking time out of your busy schedule to spend some time with me talking about leadership.

Roxanne Kaufman-Elliott: [00:05:53] Peter, thank you so much. As always, it's a delight to chat with you and especially, on your podcast. So, thank you very much for inviting me.

Peter Margaritis: [00:06:00] Oh, it's been two years since I've had you on the podcast, correct?

Roxanne Kaufman-Elliott: [00:06:06] Has it really been that long? I guess so. Yeah.

Peter Margaritis: [00:06:09] I'd have to take a look at it, but it has been a while. And just as in full transparency, I get to witness her leadership looks like a monthly basis because she's the president elect of the Ohio chapter of the National Speakers Association. So, she's getting ready to roll into our presidency about mid-2020. And man, she's good. That's all I can say. Some of the stuff that you do, well, gosh, that's great. She's the real deal.

Roxanne Kaufman-Elliott: [00:06:42] Oh, stop. You're too kind. I appreciate it. Thank you. You know what, I had good mentors for me and through this process and still do, and you're one of them. And I appreciate that.

Peter Margaritis: [00:06:52] Well, thank you very much for the kind words. That's another \$20, I guess, I owe you for this and other stuff, but-

Roxanne Kaufman-Elliott: [00:06:58] Yeah. Yeah. It is, yeah.

Peter Margaritis: [00:06:58] Exactly. So, leadership, what is it? How do we recognize it? A leadership coach in this genre, I don't like the word space, because it's the final frontier, but in this genre-

Roxanne Kaufman-Elliott: [00:07:12] Okay.

Peter Margaritis: [00:07:14] ... of leadership, I could imagine you've almost seen about everything, the good, the bad, and the ugly.

Roxanne Kaufman-Elliott: [00:07:21] I'd say. Yeah, I probably have. I'll be surprised if there's anything out there I haven't.

Peter Margaritis: [00:07:27] So, what are some of the challenges that leaders are having today in the year of 2019 as we get ready to transition into a vision, clear vision of 2020?

Roxanne Kaufman-Elliott: [00:07:39] I think you already said it. I think it is the eternal and infinite question that a lot of people don't even know to ask. They assume that they have the answer. And yet, when you ask it, it opens up a whole new way of thinking. And that question is what you've just said, it is, what is leadership? What is it really? How do we know it? How do we know it when we see it? How do we know it when we hear it, when we feel it? It's different for everybody, I think. But there are some fundamental things that we can always go back to that really speaks to genuine, authentic leadership. And those people that we would willingly follow. As a leader can't be a leader unless they have followers. That's one criteria for sure.

Peter Margaritis: [00:08:22] Yeah. Okay.

Roxanne Kaufman-Elliott: [00:08:25] So, in my experience, what are some of the challenges? Answering that question, first of all, defining what it is within your own culture, within your own life, and within your teams. So, I usually talk about leadership challenges start with you and then, they radiate out to the people in your most immediate circle, your partners, your teams, both personally and professionally. And from there, it goes to your organization, your family, your church, whatever it is, whatever you're relating to in terms of leadership.

And then, into the community. And then, into the world. And we all know that we have challenges in all of those places and including today, right? So, how do we deal with those? And that's what I have studied and been a student of for many, many, many years and continue to be not only challenged, but elated and delighted by the way people embrace finding their own path into leadership.

Peter Margaritis: [00:09:29] One does not become a leader by just taking a seminar, correct?

Roxanne Kaufman-Elliott: [00:09:33] No, you really don't. It is a learned skill. It can be a learned skill. We're not just born leaders.

Peter Margaritis: [00:09:38] Right. Right. Some are born leaders, but for the most part, it is a learned skill. And so, I know you're familiar with Simon Sinek. And I was watching an interview that he was conducting. And he said something to the effect, "Just because you

take a seminar in leadership doesn't make you a leader, you have to work on this every single day."

Roxanne Kaufman-Elliott: [00:10:01] Day. That's right. And it starts with self-awareness. This is what I find most of all is that people, because they have a title, and this is not to be critical at all, this is the way our brains work, the way we're brought up to think, is they're going to have a title of leadership, you are automatically a leader. And so, you go take a seminar and you're even more of a leader. You go to a two-day workshop and you're more of a leader.

But what we miss sometimes is the awareness. Again, it comes back to what is it really to us authentically and genuinely. And how do we develop that? So, a seminar will give you great tools. It will give you new skills and knowledge. It will help you to establish some goals. That is if you can remember any of it when you get back to your office, people start ringing and people start stopping by and jumping in with hair on fire situations, right? So, it's what we take away from it. For sure, any of those things can do that.

But like you said, this is a life long journey. It's really beginning to discover and understand, "Oh, that's leadership to me." Integrity. Walking the talk. Modeling the way. Being a visionary. Really understanding first and foremost who I am first deeply in the way that I make choices, in the way that I conduct myself, my behavior, in the way that I move through my life and in the world. And then, you make choices about that and you start building your own self-leadership around those things on a consistent basis going forward.

Peter Margaritis: [00:11:31] Right. It's that consistency and it's hard to maintain that consistency. It's hard to do that every single day with everything coming at us in many different directions. Well, I'll go back to another quote that is stuck with me for, now, about two or three years, what I heard from Simon Sinek, "Leadership has nothing to do with your title."

Roxanne Kaufman-Elliott: [00:11:52] Nothing.

Peter Margaritis: [00:11:53] "True leadership is your ability to have a positive impact on another person."

Roxanne Kaufman-Elliott: [00:12:00] That's right. Positive influence or positive impact.

Peter Margaritis: [00:12:04] But a lot of times, leaders, if we think about the disk model, they come out of that highest sort of low express or that dominant quadrant, where they love challenges, they love making decisions, but they tend to be bullies, they tend to be this, "I'm telling you what to do and I'm getting by." And it's that old '70s, '80s, even '90s old leadership style that's outdated.

Roxanne Kaufman-Elliott: [00:12:27] Well, it's carrot and stick, right? We're motivated really by three different things. And what you're talking about is the old way of thinking. It's that leadership is title, I am this C title or I am this VP title or president title or whatever it may be. So, it's what I say goes. And I'm telling you what to do. And if you do what I tell you to do, well, here's your carrot. You'll be rewarded for that. If you don't do what I tell you to do, here's the stick and it becomes punitive.

So, if something is taken away or something is not given that would have been given otherwise. And the one other motivator, it has to do with developing your own very genuine style of leadership. And that is internal motivation, internal understanding, and that starts with vision. It starts with who you are. Do I want to do this or do I have to do this? Really understanding that I'm in this job because I love it, I'm in this job because I need to be here.

So, there are subtle differences to that. And I think when we start thinking about it, we make different decisions, we have different choices in our lives. It is more in line with who we really are. So yeah, I have a whole keynote built around a fellow by the name of Joe that had no title, had no position, didn't finish high school, never had a real job, didn't have a credit card or a bank account or a Social Security number. He lived in a small town all of his life, small town of about 20,000 people.

And every single one of those 20,000 people knew him and they would have followed him into the abyss. They would have thrown themselves in front of a bus for him. He was one of the greatest leaders I've ever known. And he didn't have any of the trappings of leadership. And that had so much to do with him knowing himself, his own values, the vision of his life, planning that life the way he wanted it to be and then, taking action to make it happen. And his behavior followed that every day.

Peter Margaritis: [00:14:35] And it sounds like, Joe, I think how you-

Roxanne Kaufman-Elliott: [00:14:38] Right.

Peter Margaritis: [00:14:38] ... referred to him as Joe, that Joe, that's funny his name has three letters in it and he didn't have three letters of the ego-

Roxanne Kaufman-Elliott: [00:14:46] Ah, that's great.

Peter Margaritis: [00:14:48] ... that get in the leadership play, because the ego becomes ego leadership versus servant leadership.

Roxanne Kaufman-Elliott: [00:14:54] Perfectly said. That's exactly right.

Peter Margaritis: [00:14:57] Yeah. So, with your clients, I mean, I can imagine leadership today can be a bigger challenge than maybe it was back in the '80s and '90s. We get different dynamics coming as we get different technologies, we're dealing with different mindsets that are out there. So, what are you seeing from your clients in some of these challenges that they've experienced? And is there a main thread that gone, "Okay. I'm hearing this three or four times from my clients. This is becoming a bigger issue than maybe it was five, six years ago"?

Roxanne Kaufman-Elliott: [00:15:35] I think there are a few of those threads. Absolutely. One of the biggest ones is generational, is connecting the generations to each other. I call it generational intelligence. Leadership is not just about where you are in your role right now, but it's the succession planning of the organization. It's pulling people together to share the vision of the organization. And that's very different from somebody who is 25 years old going

into their first career move out of college or shortly thereafter than it is to a 55-year old in that phase of their career.

They're looking at things very differently. They're looking at the business very differently. We also have a whole lot of influx of folks coming into businesses that are changing careers or changing jobs every couple of years. In years past, that hasn't been the case. We've had people who became very much integrated over the long term in organizations and they developed a culture that was unspoken and yet known. And this now becomes a really big challenge in organizations, because you have so many different people coming and going of all these different generations all of the time with different needs, different wants, different ideas of what success is, different ideas of what leadership is and is not.

So, it boils down to opening up lines of communication, really. And that's on all generations, all five generations in the workforce. If we could all just open our minds a little bit more to have a conversation and ask more questions and learn from each other, I think that would be a great place to start. I've seen that to be a great place to start. And then, when you get specific structures and formats in place that can support that through leadership programs, then you start making real progress.

Peter Margaritis: [00:17:23] Yeah, the whole generational struggle. I don't like the N word. I don't like how people use the N word.

Roxanne Kaufman-Elliott: [00:17:32] I don't use it. Right.

Peter Margaritis: [00:17:32] I think it's a terrible word, because it's very demeaning.

Roxanne Kaufman-Elliott: [00:17:39] It is.

Peter Margaritis: [00:17:40] And I keep going, "Just because that group operates differently doesn't make it wrong."

Roxanne Kaufman-Elliott: [00:17:46] Right.

Peter Margaritis: [00:17:47] We can't go backwards.

Roxanne Kaufman-Elliott: [00:17:50] Exactly.

Peter Margaritis: [00:17:50] We have to move forward and we have to have more tolerance and more self-awareness and more gratitude and be more open to other ways and we can learn from them and they can learn from us.

Roxanne Kaufman-Elliott: [00:18:05] Well, that then also crosses over into companies acquiring other companies and merging. I've worked with a lot of this over the years in middle market, in large companies, and even some of the smaller companies that I've worked with. The dynamics are pretty much the same. There's not a lot of difference in terms of human dynamics. The scope of it changes with the size of the organization and if it's global or national.

But again, it's, first of all, understanding the other person, the other organization, the culture. What is this person going through? I've dealt with sales groups and organizations

that have had clashes because of mergers and acquisitions. But once they begin to understand where each side is coming from and they find common ground, it's like the fog lifts and everybody's eyes light up. And then, they start having great conversations about possibilities rather than, "Oh, we used to do it that way."

Peter Margaritis: [00:19:06] Right.

Roxanne Kaufman-Elliott: [00:19:06] Now, as well, "What if we did it this way", right?

Peter Margaritis: [00:19:10] What if. What if we did it this way? So, are more leaders embracing that, "Well, maybe there's another way."

Roxanne Kaufman-Elliott: [00:19:19] You know, it's funny, and I've learned this actually from you, in your work in improv, that yes, there are two things that I put in front of people a lot more now than I used to. And it really resonates with them. I just love it when I see them light up with it. But they'll say, "Yeah, I hear what you're saying, Roxanne, but" or "No, we can't do it. We did it that way, you know, 10 years ago and it didn't work. Yeah. We're not going to do it that way."

So, what I introduced are a couple of things. First is, "Well, what if you painted a picture? Just take the knows and the experiences that didn't work and let's set those aside for a moment and instead, let's paint a big picture. And I mean, really paint a picture. We get our markers and all this stuff, we draw on paper, on the walls, and draw a picture of what the ideal solution to this problem would be, what the ideal configuration of your team would look like, what the ideal outcome of this succession plan would be in 15 years. Draw it. Tell me a story. What is that? Let your mind go. All things are possible. Nothing is in your way."

And they create a what if scenario. So, we step back and look at that and say, "Okay. So, this is all pie in the sky, right?" "Yeah. Right, Rox. Right." "And what if it wasn't? What if you could actually do that? What would it take? Who would it take? What do you need to do?" And so, it begins a great conversation. The other thing is when I get this "no, but", "no, but", "no, but" all the time, I'll say, "What if-", I combined the two, "... you just did one little thing." I say, "What if we said, instead, 'yes, and', and then, we have a conversation?"

And they kind of look at me and they turn their head a little bit. And then, I pause and I'll say, "Okay. What do you guys think of when you hear the word improvisation or improv or Second City or telling jokes or funny stuff?" So then, we go in and I won't go into it. You know, you're the teacher, Peter, but you know it better than I do, but it's not about any of that. It's about being very present in a moment, in the moment that you are in right now and making that the best moment that it can be.

So, it's right now, right here. Where are you? What are you doing? And flipping the switch and turning your mind from, "no, but" to, "Yes, I hear you. Yes, I need to understand more. And what would that be?" So, you start having those conversations. I've done this now probably 10 times in the past eight months. And every time I have that conversation, whether it's with the top executives of a firm or independent contributors that have just joined the firm, they all do the same thing. They sit back, their body language changes, their

arms go back, their body positions open, their brains open, and they start having a conversation, which, by the way, can get very robust at times and-

Peter Margaritis: [00:22:18] Right. Yeah.

Roxanne Kaufman-Elliott: [00:22:19] ... challenging, but that's so cool, because that's when the ideas start raking.

Peter Margaritis: [00:22:26] Yes. And that is really cool when that does happen. And thank you for carrying the torch and getting the good word out there about the improv world and how we can make a big difference. And it's funny, when I talk to other leaders in their organizations and I talk about the "yes, and" approach, it's kind of the same thing, then the light bulb goes on and go, "Oh, now, I get it."

Roxanne Kaufman-Elliott: [00:22:51] Yeah.

Peter Margaritis: [00:22:51] And it's fun to watch them gravitate and grab on to the concepts. But once again, it takes daily work at it. And it's so easy to fall off that wagon.

Roxanne Kaufman-Elliott: [00:23:04] That's right. That's why when we're talking about leadership, and let's just go to a business point of view, when we're talking about incorporations and the work that those of us who are in this development place, with these organizations. That's why I don't do two-day seminars, quite frankly. Not that they're not important, not that they don't have an impact, a lot of them do. And they serve a great purpose. And I just want to give that all the respect that it deserves. Absolutely.

But the really long term, over the course, and especially, if you are building cultures of leadership, which is one of my areas of focus and expertise, is really digging into the heart of an organization and the heart of the people. And aligning them to what it means to have a culture of leadership, how that will improve the bottom line, how that will help them to meet their goals and objectives.

And when I'm in a meeting, I know that it's working because they do it over time. And it sits constant, constantly reminding them when we have people budding up and become accountability partners. I do a ton of coaching after I do these programs and even while I'm doing them to reinforce what we're learning. And then, when I'm in a meeting with the executive team of a corporation and they're discussing something and someone says, "No, we've done that before."

And I hear the CEO say, "Wait a minute. Wrong answer. Yes, but", that this kind of lights up entire room. And I go, "Whoa, man, this stuff really works." So, that's the cool thing when you get to hear that and see that happening before your eyes. And it changes the ship's turn. These big ships, little speedboats or medium-size, whatever they are, they turn, they start to turn in a better direction. It's the coolest thing in the world to see that. And you can tell I don't like what I do, right?

Peter Margaritis: [00:25:02] No. Yeah. Could you throw a little passion in there, please? I mean, you're starting to sound like Ben Stein in Ferris Bueller's Day Off, "Anyone? Anyone? Anyone?"

Roxanne Kaufman-Elliott: [00:25:11] Right.

Peter Margaritis: [00:25:12] Yeah. So, as you say, I mean, you get into the culture of the organization. You're digging deep. And you're trying to find what is all of this about within the organization. So, my question, as you're doing this, what's the difference between a leadership coach and a therapist?

Roxanne Kaufman-Elliott: [00:25:34] I wish I knew. I think it's the letters behind your name quite frankly, it's not what we're doing.

Peter Margaritis: [00:25:45] So, if you're looking at a CEO of an organization, they may not have started the business, but it's their business.

Roxanne Kaufman-Elliott: [00:25:51] Right. Oh, absolutely.

Peter Margaritis: [00:25:53] And especially those who have started the business, there's a lot of passion around that. And I can imagine at times, there's an opaque line between what's leadership and business and "Oh, could you help me with this problem I'm having?" And it becomes a very personal issue, which now, is like, "Oh, wait. Well, hold on. We've just crossed that line a bit."

Roxanne Kaufman-Elliott: [00:26:16] Crossed the line. Right.

Peter Margaritis: [00:26:17] How do I get you back on that side of that and take that to somebody with the letters behind—I have letters, you have those behind your name, but business-

Roxanne Kaufman-Elliott: [00:26:27] Not those letters.

Peter Margaritis: [00:26:27] Yeah, not those letters.

Roxanne Kaufman-Elliott: [00:26:28] Not those letters. And this happens more frequently than you can imagine. Well, maybe that's an incorrect statement, because anytime you're dealing with—well, I'll use this analogy, it's probably not a very good one, but when you're working with somebody's baby, when you're working with the owner of a company or someone who's highly vested in a company, it's a very emotional attachment, as it should be.

Peter Margaritis: [00:26:51] Yeah.

Roxanne Kaufman-Elliott: [00:26:52] That's why they're successful because they're passionate about it. And a lot of times, it does cross the line where it goes into—and I have those of us who do this, we're pretty well-trained about knowing the signs of something like that when it's starting to happen. And you have such empathy, you want to talk to them. So,

I always call it as soon as I see it and I try to be—I don't try to be, I am very gentle, but very clear.

I have my coach hat on. And I say it, I don't have those letters behind my name. I'm an empathetic person and I'm happy to listen to you. I don't have any answers for you. And even as a coach, Peter, even as a facilitator and a moderator in all of the work that I do, everything is focused on helping you to figure out what you already know. I don't know anything. I don't have any answers for you. And I tell that to my clients, "What I have is a whole lot of experience and those letters behind my name that give me the tools to bring to you so that we can facilitate you getting out of your own way and to find out what it is you already know, you just don't really know it yet."

It sounds kind of weird, but that truly is what we do as coaches and as facilitators and moderators. And at least in the areas where I work, is I will never tell you what to do. I will ask you a ton of questions and they won't be easy and you won't like me for some of those questions, because they can get very probing. But it's important that we all do that for ourselves within our own internal conversations. And then, having somebody on the outside that can do that well can be game changing. Makes you think about things in ways you haven't before.

Peter Margaritis: [00:28:44] Oh, I can imagine that. And having these conversations and you uncover some really raw nerves, I'm sitting there as you're describing this kind, I imagine you've been told to leave a couple of times in the places you've asked the hard-court question and you're uncovering these raw nerves, but once you uncover it, they have to address it.

Roxanne Kaufman-Elliott: [00:29:13] That's right. And although you'd think that I would have been asked to leave, I haven't yet. But I'm pretty darn close. No, I'm pretty darn close.

Peter Margaritis: [00:29:21] So I just-

Roxanne Kaufman-Elliott: [00:29:23] What does happen is they'll bite my head off or come back at me, and why wouldn't they, right? You just, like you said, touched a nerve. It doesn't happen very often. These are not typical conversations, don't misunderstand. It's usually at business levels and high levels. But even at that, there are some sensitive areas. And if that happens, I just let them bring it on. And then, we usually end up laughing. We always end up laughing about it because I always wind kind of around to them and say, "You are really good at just taking the swing, aren't you? But thing is I'm resilient. You can't take me down." So, you just have a certain mindset for the, "This is not about me." None of it is ever about me when I'm working with my clients.

Peter Margaritis: [00:30:11] So, as you say that, I'm going, okay, your emotional intelligence level is extremely high because you're very self-aware. You're very socially aware. You see the anger. You see the raw nerve. And you see them coming at you with that anger, but you know that it's not really at you.

Roxanne Kaufman-Elliott: [00:30:28] Yeah, I know.

Peter Margaritis: [00:30:29] You just happen to be there.

Roxanne Kaufman-Elliott: [00:30:32] Right.

Peter Margaritis: [00:30:32] Right. And that's a talent that a lot of people don't have because we've become extremely defensive when we're being attacked.

Roxanne Kaufman-Elliott: [00:30:41] Or when it feels like we're being attacked.

Peter Margaritis: [00:30:43] Well, yeah. When it feels like we're being attacked.

Roxanne Kaufman-Elliott: [00:30:46] Right.

Peter Margaritis: [00:30:46] And not leaning into that emotion-

Roxanne Kaufman-Elliott: [00:30:50] Right.

Peter Margaritis: [00:30:50] ... and taking that on because it'll just all go haywire. So, you have a lot of self-awareness and self-control. And what's your emotions to maintain that very start? I'm assuming very business-like and just let them vent. And that's fine. And I hope that they realize what's going on because the tide will turn-

Roxanne Kaufman-Elliott: [00:31:15] Right.

Peter Margaritis: [00:31:15] ... and somebody will be venting at them, but they'll get very defensive and say, "Well, wait, Rox didn't get defensive." It's not about the nail. It's not about the nail.

Roxanne Kaufman-Elliott: [00:31:29] It's not. You're absolutely right. I love that. I love that. No. And they do. They do pick up on it. And they do learn from it. And I will tell you, though, and thank you for saying that, it is something that I thought everybody did when I was a kid growing up. And throughout my career, I thought everybody thought that way or did that. I don't always do it in my personal life, but that's a little different. But it is for all of us. I'm not that good. Geez.

But professionally, yeah, I thought everybody thought that way until I left my nonprofit career years ago and went into corporate. And that was way, way different. And I learned it very differently. And here's what the majority of folks do, it's a small percentage, those that react that way. It's powerful when they do, so it seems like it's bigger than it is. But the majority of folks, because you have established trust, because you have established this fiduciary responsibility that everything that it says here stays here.

I always tell everybody I have this gigantic vault in my head, where all these conversations go into their own places and they never come out unless you tell me you want them to, and we can pull them out. Otherwise, they stay there. But what I find is that most of the folks that I work with, and this is true in the large groups, the medium groups, and the small groups that I work with, as well as the one-on-one coaching that I do, is that you see them, again, physically change.

They sit back in their chair, their chins go up. These are all body languages that are saying, "Oh, I'm moving to a different place and becoming more open to what she's saying." And then, they start questioning it. And that's a very cool thing when you see that happen, because they're saying, "Okay. Well, how do I think about this differently?" And oftentimes, there are those robust conversations and a lot of push back.

But at the end of the day, those are highly productive conversations. And I think more teams and groups need to be having those, "Put it on the table, get the elephants in the room." That's another leadership challenge, is people being willing to do that and put them out there with clarity to really call it out. Not people, the issues. We're not calling out people, we're calling out issues. Most people problems directly go back to process and structure and strategy or lack thereof. And I used, actually, a five-pointed star to talk about this when I'm talking at a high level.

Say, there are five things that every successful organization does well. The first is strategy, your vision, values, and purpose. Why are you here? Go back to Simon Sinek. What's your why? Then, what's your structure? How have you structured your organization to fulfill that vision, those values, and your purpose? What's that structure? What then are the processes that have to flow through that structure to continue to build upon and deepen the success of the vision, the values, and your purpose? Then, over here in the other side of the star, all those three points are great, but if they stand alone, you have nothing because you don't have the humans.

Peter Margaritis: [00:34:48] The humans.

Roxanne Kaufman-Elliott: [00:34:49] You need humans.

Peter Margaritis: [00:34:50] Yeah.

Roxanne Kaufman-Elliott: [00:34:51] You need humans in there to do this. So, then, you have the people point of the star. And this is where you go into what I call i3 Leadership, which I can go on about in another podcast. But that's to inspire, ignite, and impact. Those three things will get you through any crisis or anything in your whole life. And then, you have to have systems in place that directly connect people that support them and encourage their hearts and give them the tools that they need to become the best of who they are.

Whether that be leadership development work, whether that be technical, training that they need in their particular area of expertise, whatever it may be, and reward systems. How are you rewarding these people for the work that they're doing in a way that's meaningful? That it's not just a carrot. That it's something that aligns to their purpose and their vision, which aligns to your organizational vision and purpose. Imagine the harmony in all of that when everybody's pulling the rope in the same direction. So, long answer to a short question, Pete.

Peter Margaritis: [00:35:50] Oh, no.

Roxanne Kaufman-Elliott: [00:35:51] That brings me around to why do what I do.

Peter Margaritis: [00:35:53] No, that-

Roxanne Kaufman-Elliott: [00:35:55] I just send out stars to people and say, "Here, fulfill this and you'll be happy."

Peter Margaritis: [00:35:59] Okay. I love the star analogy. And try this next time when you're working with the CEO or whomever, ask them a very simple question, what business are they in?

Roxanne Kaufman-Elliott: [00:36:13] Oh, yeah. That's the important question.

Peter Margaritis: [00:36:15] Or, where in the insurance business or in the accounting business or in the consulting business? And I tell audiences, all of those are byproducts of the business that you're in.

Roxanne Kaufman-Elliott: [00:36:25] Exactly right.

Peter Margaritis: [00:36:27] And there's been a few times I think I've almost come to fisticuffs with some of the audience members because I kept pushing them and pushing them and literally trying to get them a little frustrated with. And I go, "You're in business here and you're in the people business."

Roxanne Kaufman-Elliott: [00:36:37] That's right.

Peter Margaritis: [00:36:38] "First and foremost, without people, you have no business."

Roxanne Kaufman-Elliott: [00:36:41] Exactly right. It's good to tell that.

Peter Margaritis: [00:36:44] And that's what I told. And talk about a change in mindset. An attendee shared a story about when he was in public accounting and his first day on the job at a big a public accounting firm back in the, I think it was like at the '90s, which is about the time I started as well, he said that the managing partner came in and said, "Ah, new staff. We look at new staff like toothpaste. We squeeze everything out of you. And let me put the top back on and then, we throw you away."

Roxanne Kaufman-Elliott: [00:37:21] He actually said that?

Peter Margaritis: [00:37:22] Yeah. And he swears by that's what was said. And I believe it because my example that I have, it's similar in nature, but not to that extreme. But I believe it, because we don't look at people as our business.

Roxanne Kaufman-Elliott: [00:37:44] Right.

Peter Margaritis: [00:37:44] We look at the, what business are making money? That's a byproduct.

Roxanne Kaufman-Elliott: [00:37:50] That's right. The money is a byproduct.

Peter Margaritis: [00:37:51] Yeah. Go ahead. After you.

Roxanne Kaufman-Elliott: [00:37:54] Thank you. Whenever I start with a new group or even sometimes when I'm speaking, doing a presentation or keynote, I will ask a question. I would say, "I want you to-", and I usually have tools for them to do this with, but, "... pause for a

moment. And I would like you to think about and write down what you do. I don't want to know what your title is. I don't want to know what your product is. I want to know what you do." And it's the same question, "What business are you in?" Every single one of us, no matter what business we are in, we are in the relationship business.

Peter Margaritis: [00:38:31] Right.

Roxanne Kaufman-Elliott: [00:38:31] We are in the people business. Without relationships and without focusing on how we develop those relationships, that's the focus of everything that we should be doing. Everything else is ancillary to that. The what and the how, as Simon says, right?

Peter Margaritis: [00:38:46] Right.

Roxanne Kaufman-Elliott: [00:38:47] It's ancillary to that. It's building a relationship first.

Peter Margaritis: [00:38:51] And there's a fellow NSA member, Bob Pacanovsky. I don't know if you've met Bob or not.

Roxanne Kaufman-Elliott: [00:38:56] I have not.

Peter Margaritis: [00:38:56] He has the black-tie experience and I was interviewing him on the podcast. He was, "You're right. We're in the people business, but let's take that another level, we're in the people-size customer service business." Do we go back to restaurants that we get poor customer service? Do we go back to places where we get poor customer service?

Roxanne Kaufman-Elliott: [00:39:16] Of course not.

Peter Margaritis: [00:39:16] No, but we're expecting that we're giving poor customer service to our own internal customer and we wonder why they're leaving.

Roxanne Kaufman-Elliott: [00:39:25] Right.

Peter Margaritis: [00:39:26] Going back to the generational issues. Well, why are they leaving? Well, because your organization doesn't meet their needs.

Roxanne Kaufman-Elliott: [00:39:33] And first, the organization has to understand what those needs are.

Peter Margaritis: [00:39:37] Right.

Roxanne Kaufman-Elliott: [00:39:37] The needs of 20 and 30-year olds are very different than 40 and 50-year olds, or 60 and 70-year olds. It's all different for every single group. My two youngest children are still in their 20s. All they want to do is make a difference. They want to hone their skills in ways of intense purpose for themselves to make a difference and make an impact on the world. That can mean anything. That can mean nuclear physicist or a United Nations position or a humble nonprofit somewhere in some far-off town of 20 people, who knows?

Peter Margaritis: [00:40:20] Right.

Roxanne Kaufman-Elliott: [00:40:20] It's what's important to them. So, it does go back to the generation, you need to understand what they need and want.

Peter Margaritis: [00:40:27] Right. But can you predict the future?

Roxanne Kaufman-Elliott: [00:40:34] Well, I do have a crystal ball, but it doesn't work that way.

Peter Margaritis: [00:40:37] Well, actually, it does.

Roxanne Kaufman-Elliott: [00:40:38] No.

Peter Margaritis: [00:40:39] Actually, you can predict the future. And there's some hard trends, as leaders, we can predict. One of those is technology.

Roxanne Kaufman-Elliott: [00:40:48] Yes.

Peter Margaritis: [00:40:49] Your next phone is not going to be a dumber phone than the one that you have now.

Roxanne Kaufman-Elliott: [00:40:52] No, you're right.

Peter Margaritis: [00:40:55] And we see technology evolve artificial intelligence, block chain, these robotic process automation, all the stuff that's out there. So, we can somewhat see it and predict it. Demographics, well, let's see. We got a bunch of baby boomers out there getting old, so they're going to start retiring.

Roxanne Kaufman-Elliott: [00:41:11] Right.

Peter Margaritis: [00:41:12] The Gen X, that was a smaller demographic that's out there. And then, we got the Ys or what they call the millennials, and I read somewhere by the year 2025, 75% of the global workforce will consist of millennials.

Roxanne Kaufman-Elliott: [00:41:33] Really?

Peter Margaritis: [00:41:34] Yes.

Roxanne Kaufman-Elliott: [00:41:35] What a statistic. That's in five years?

Peter Margaritis: [00:41:37] Yes, if not sooner. Because that is such a big population. And especially-

Roxanne Kaufman-Elliott: [00:41:43] Sure.

Peter Margaritis: [00:41:44] ... in proportion to the baby boomers who are the-

Roxanne Kaufman-Elliott: [00:41:48] Yeah.

Peter Margaritis: [00:41:48] Yeah. There's a big hole at the bottom of that bucket, they're draining out. And we've got this big, big opening, but we haven't changed the bucket to really attract them to come into our organizations.

Roxanne Kaufman-Elliott: [00:42:00] I absolutely love that. Thank you for sharing that because I have a lot of data that I use on generations, but I did not have that number.

Peter Margaritis: [00:42:07] And I'm trying to remember where I got it from. It may have been from the Deloitte Millennial 2019 study or I'll find the resource.

Roxanne Kaufman-Elliott: [00:42:18] That would be great. Yeah.

Peter Margaritis: [00:42:19] Yeah, because you know that 75% of all statistics are made up, right?

Roxanne Kaufman-Elliott: [00:42:23] Yeah. I thought it was 77.2%.

Peter Margaritis: [00:42:26] Yeah. That-

Roxanne Kaufman-Elliott: [00:42:27] Yeah, let's be exact, shall we? Let's be precise.

Peter Margaritis: [00:42:30] Come on. I'm an accountant, I can't do that. I'm an accidental accountant, I can't do that.

Roxanne Kaufman-Elliott: [00:42:34] Right.

Peter Margaritis: [00:42:35] So, as we begin to wrap up, what advice can you give our audience in the terms of becoming a better leader?

Roxanne Kaufman-Elliott: [00:42:45] Well, I could do this in a couple of different ways. Let me see. But we're wrapping up, so I won't, I will do this a different way.

Peter Margaritis: [00:42:53] Well, I mean, you can just tell both ways.

Roxanne Kaufman-Elliott: [00:42:56] Okay. From a very high level, I mentioned there are three things that you can do that will change anything that you are working on, decisions that you're making in your life. It will change the way you do that and change the outcome, the more positive outcome. Three things only. And each of them begin with the letter, I. First of all, look deep inside and know what inspires you. If you're thinking about taking a job, going to college, changing jobs, starting a business, buying a house, planning a party, it doesn't matter what it is. It can be the biggest thing or the littlest thing, principles still apply. What does it look like in its ideal form?

Peter Margaritis: [00:43:45] Yeah.

Roxanne Kaufman-Elliott: [00:43:45] What I mentioned earlier, it's not what if, what does it look like? Then, once you get that painted and that just makes you smile, and that makes you, "Yes, that's what I want. Yes. That's where I want to be with this", then put a plan in place. And this goes back to just very, very basic strategic thinking and planning that every business does or should do. And that is, you do it for your life, too.

You say, "What is my vision? What do I want my life to be like? What do I need to do to make that happen? Where do I need to move that needle in the next three to six months?" And then, you change that every three to six months. And then, within that three to six months, what are the three most important things I need to do to get to a result, get you an accomplishment, gets you there. And then, you write down the action steps. You take under each one.

And here's the most important part, so what you've done is you've given yourself the inspiration, you've ignited that with planning, you've broken it down into smaller chunks, so you can put it in your planner. And you can wake up tomorrow and do the third I, which is to make the impact, which is to do something. Take some action. Inspire is your vision. Ignite is your plan. Impact is your action.

You align that all to your values, and to what you want and what you don't, and you're going to find more success than you have. Specifically, in the second tier I would share with you, there are five behaviors that if you think about these very intentionally and very purposefully and you write them down and you work on these every single day or work on them one-a-week for five weeks and then, rinse, wash, repeat, it will be, first of all, you walk your talk, model the way.

The second one is to know what your vision is. Find out what other people's visions are and then, inspire the intersecting point. Inspire shared visions. When you can share pieces of your visions with each other, you form deep relationships, you form trust. Third, challenge processes. Challenge what you've always done. Is it still worth doing? Do the reasons that you are doing it this way still exist or were they started? Was this process started 20 years ago in a very different time, in a very different economy, in a very different—challenge processes.

Fourth, enable people to act. Enable in a good way, not in a psychologically negative way. In a good way, see people's strengths. Talk to them about that. What do they love? If you can find a person's passion, you're going to find their strengths. And then, give them the tools, the knowledge to hone that skill, to grow within that area of their lives to become the very best of who they can be doing what they love and are most passionate about. And then, the fifth thing, which to me is probably the most important thing in the entire universe, in our entire existence as human beings, is to encourage the heart. Life's journey is life's journey. It's got a lot of ups and a lot of downs.

And it's important for us to be connected and in tune with others. So that when they have even the tiniest little accomplishment that may seem meaningless to everybody else around them, one person, that would be you, comes up to them and just gives them a little pat on the shoulder or look in the eye or whatever it is that's you and you just say, "Wow. You do have to rock that out of the world this time." Encourage the heart. This is not woo-woo. This is not making up stuff because we're supposed to tell people good things. It's being genuine. It's being honest. It's being observant. It's being present. Recognizing people for what they do very simply and very plainly, then move on.

Peter Margaritis: [00:47:41] Well done.

Roxanne Kaufman-Elliott: [00:47:42] Thank you.

Peter Margaritis: [00:47:43] So, how can people find you, Roxanne?

Roxanne Kaufman-Elliott: [00:47:46] They can find me at, right now, the website is www.prolaureate.com, P-R-O-L-A-U-R-E-A-T-E. That's changing within the next 30 days to a new brand that will simply be Roxanne Leadership. That's much easier to remember and to forget. Roxanne is two Ns, Roxanne Leadership. And the best way to reach me is through text or cell phone, give me a call, 216-544-7528.

Peter Margaritis: [00:48:20] Great. Now, you know how to reach her and think about what she said there about the five things. Think about the star. Think about the i3. And make time. Force yourself to make time every single day to work on it. I love how she breaks that down and says, "Now, you got the pieces. Now, let's put it in action." It's logical. It's a process. It's a system. And you have to continue to do it every single day. You could take Thanksgiving off and take Christmas off. Yeah, because we all do need a little bit of time away, but it needs to stay in the forefront of our lives in vast majority of the time. Roxanne, thank you once again for your wisdom-

Roxanne Kaufman-Elliott: [00:49:05] Thank you.

Peter Margaritis: [00:49:06] ... your time. And I look forward to seeing you here soon. But this will be in December. I'll see you on our chapter meeting in January, I assume, call because it'll probably be snowing somewhere here in Ohio, I bet that.

Roxanne Kaufman-Elliott: [00:49:20] Usually is in Cleveland. Peter, thank you so much. Like I said, I appreciate this so much. A lot of gratitude for having the opportunity to talk with you today and all your listeners. So, thank you very much.

Peter Margaritis: [00:49:33] I appreciate that. Thank you, too.

I would like to thank Roxanne again for her time and showing her leadership knowledge with you, my audience. Thank you for listening. If you enjoyed this podcast, please take a moment and leave a review on iTunes or whatever platform you download your podcast from. Also, please subscribe and share this episode with a friend. Make today your best day.

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