



The Advantage

Why Organizational Health Trumps Everything Else in Business

THE SUMMARY IN BRIEF

“Organizational health will one day surpass all other disciplines in business as the greatest opportunity for improvement and competitive advantage.”

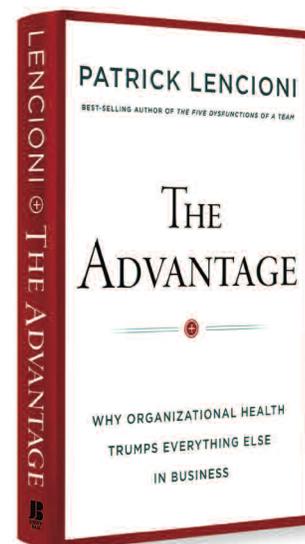
This is the promise of *The Advantage*, Patrick Lencioni’s bold manifesto about the most unexploited opportunity in modern business. In his immensely readable and accessible style, Lencioni makes the case that there is no better way to achieve profound improvement in an organization than by attacking the root causes of dysfunction, politics, and confusion.

While too many leaders are still limiting their search for advantage to conventional and largely exhausted areas like marketing, strategy, and technology, Lencioni demonstrates that there is an untapped gold mine sitting right beneath them. Instead of trying to become smarter, he asserts that leaders and organizations need to shift their focus to becoming healthier, allowing them to tap into the more-than-sufficient intelligence and expertise they already have.

The author of numerous best-selling business fables including *The Five Dysfunctions of a Team* and *Death by Meeting*, Lencioni takes a different route in *The Advantage*. He forgoes fables and instead draws upon his 20 years of writing, field research, and executive consulting to some of the world’s leading organizations. The result is, without a doubt, Lencioni’s most comprehensive, significant, and essential work to date.

IN THIS SUMMARY, YOU WILL LEARN:

- The three biases that prevent leaders from embracing organizational health.
- The difference between a smart organization and a healthy organization.
- Why the Four Disciplines model builds and maintains organizational health.
- The secrets to cascading communication throughout your entire company.
- How you can hold meetings and still have plenty of time for your job.



by Patrick Lencioni

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THE COMPLETE SUMMARY: THE ADVANTAGE

by Patrick Lencioni

The author: Patrick Lencioni is founder and president of The Table Group, a management consulting firm specializing in organizational health and executive team development. He is the author of nine business books with more than 3 million copies sold.

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The Case for Organizational Health

The single greatest advantage any company can achieve is organizational health. Yet it is ignored by most leaders even though it is simple, free, and available to anyone who wants it.

That is the premise of *The Advantage* — not to mention my career — and I am utterly convinced that it is true. If it sounds absurd, it should. After all, why in the world would intelligent human beings ignore something that is powerful and readily accessible? That question was finally answered for me on July 28, 2010.

I was attending a client's leadership conference, sitting next to the CEO. This wasn't just any company. It was, and still is, one of the healthiest organizations I have ever known and one of the most successful American enterprises of the past 50 years.

As I sat there at the conference listening to one presentation after another highlighting the remarkable and unorthodox activities that have made this organization so healthy, I leaned over and quietly asked the CEO a semi-rhetorical question: "Why in the world don't your competitors do any of this?"

After a few seconds, he whispered, almost sadly, "You know, I honestly believe they think it's beneath them."

And there it was.

The Three Biases

In spite of its undeniable power, so many leaders struggle to embrace organizational health because they quietly believe they are too sophisticated, too busy or too analytical to bother with it. In other words, they think it's beneath them.

This is a shame because organizational health is different. It's not at all touchy-feely, and it's far bigger and

more important than mere culture. More than a side dish or a flavor enhancer for the real meat and potatoes of business, it is the very plate on which the meat and potatoes sit.

But before leaders can tap into the power of organizational health, they must humble themselves enough to overcome the three biases that prevent them from embracing it. The three biases are:

The Sophistication Bias: Organizational health is so simple and accessible that many leaders have a hard time seeing it as a real opportunity for meaningful advantage.

The Adrenaline Bias: Becoming a healthy organization takes a little time. Unfortunately, many of the leaders I've worked with suffer from a chronic case of adrenaline addiction, seemingly hooked on the daily rush of activity and firefighting within their organizations. As simple as this may seem, it remains a serious obstacle for many dysfunctional organizations led by executives who don't understand that old race-car drivers' axiom: *you have to slow down in order to go fast*.

The Quantification Bias: The benefits of becoming a healthy organization, as powerful as they are, are difficult to accurately quantify. Organizational health permeates so many aspects of a company that isolating any one variable and measuring its financial impact is almost impossible to do in a precise way.

Smart Versus Healthy

Smart organizations are good at those classic fundamentals of business — subjects like strategy, marketing, finance and technology — which I consider to be decision sciences.

But being smart is only half the equation. Yet somehow it occupies almost all the time, energy and attention



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of most executives. The other half of the equation, the one that is largely neglected, is about being healthy.

What I find particularly amazing is that none of the leaders I present to, even the most cynical ones, deny that their companies would be transformed if they could achieve the characteristics of a healthy organization. They never dismiss it as touchy-feely, and they immediately recognize the practical connection between a lack of health and overall performance. It would be natural to assume that those executives would then march back to their companies and focus a large portion of their time, energy and attention on making their organizations healthier.

I've come to learn that even well-intentioned leaders usually return to work and gravitate right back to the "smart" side of the equation, spending their time tweaking the dials in marketing, strategy, finance and so forth.

The Four Disciplines Model

An organization doesn't become healthy in a linear, tidy fashion. Like building a strong marriage or family, it's a messy process that involves doing a few things at once, and it must be maintained on an ongoing basis in order to be preserved. Still, that messy process can be broken down into four simple disciplines:

Discipline 1: Build a Cohesive Leadership Team. An organization simply cannot be healthy if the people who are chartered with running it are not behaviorally cohesive in five fundamental ways.

Discipline 2: Create Clarity. The leadership team of a healthy organization must be intellectually aligned and committed to the same answers to six simple but critical questions.

Discipline 3: Overcommunicate Clarity. Once a leadership team has established behavioral cohesion and created clarity around the answers to those questions, it must then communicate those answers to employees clearly, repeatedly and enthusiastically.

Discipline 4: Reinforce Clarity. In order for an organization to remain healthy over time, its leaders must establish a few critical, nonbureaucratic systems to reinforce clarity in every process that involves people. ●

Discipline 1: Build a Cohesive Leadership Team

There's just no way around it. If an organization is led by a team that is not behaviorally unified, there is no chance that it will become healthy. But first, we need to get clear on what a leadership team really is.

So many teams I've encountered struggle simply because they're too large. A leadership team should be made up of somewhere between three and 12 people, though anything over eight or nine is usually problematic. There is nothing dogmatic about this size limit. It is just a practical reality.

Now that I've put forward a general definition of what I mean by a leadership team, let's focus on the steps for building a cohesive one. At the heart of the process lie five behavioral principles that every team must embrace:

Behavior 1: Building Trust

Members of a truly cohesive team must trust one another.

Many people think of trust in a predictive sense; if you can come to know how a person will behave in a given situation, you can trust him or her. As laudable as that might be, it's not the kind of trust that lies at the foundation of building a great team.

The kind of trust that is necessary to build a great team is what I call vulnerability-based trust. This is what happens when members get to a point where they are completely comfortable being transparent, honest and naked with one another, where they say and genuinely mean things like, "I screwed up," "I need help," "Your idea is better than mine," and even, "I'm sorry."

At the heart of vulnerability lies the willingness of people to abandon their pride and their fear, to sacrifice their egos for the collective good of the team. While this can be a little threatening and uncomfortable at first, ultimately it becomes liberating for people who are tired of spending time and energy overthinking their actions and managing interpersonal politics at work.

As important as it is for all members of a leadership team to commit to being vulnerable, that is not going to happen if the leader of the team, whether that person is the CEO, department head, pastor or school principal, does not go first. If the team leader is reluctant to acknowledge his or her mistakes or fails to admit to a weakness that is evident to everyone else, there is little hope that other members of the team are going to take that step themselves.

Behavior 2: Mastering Conflict

Contrary to popular wisdom and behavior, conflict is not a bad thing for a team. In fact, the fear of conflict is almost always a sign of problems.

Even when teams understand the importance of conflict, it is frequently difficult to get them to engage in it. That's how powerful our cultural aversion is to discom-

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fort. In order to break through that aversion, there are a few things that a team leader can do.

One of the best ways for leaders to raise the level of healthy conflict on a team is by mining for conflict during meetings. This happens when they suspect that unearthed disagreement is lurking in the room and gently demand that people come clean.

Another tool for increasing conflict is something I refer to as real-time permission. The idea here is that people need to get immediate feedback, the positive kind, when they start to try out this approach to conflict. And no matter how minor the nature of that initial conflict might seem, it is going to be uncomfortable.

Behavior 3: Achieving Commitment

The reason conflict is so important is that a team cannot achieve commitment without it. People will not actively commit to a decision if they have not had the opportunity to provide input, ask questions, and understand the rationale behind it. Another way to say this is, “If people don’t weigh in, they can’t buy in.”

Most leaders have learned the art of passive agreement: going to a meeting, smiling and nodding their heads when a decision is made that they don’t agree with. They then go back to their offices and do as little as possible to support that idea. The impact of this is often embarrassing and costly for the organization.

The only way to prevent passive sabotage is for leaders to demand conflict from their team members and to let them know that they are going to be held accountable for doing whatever the team ultimately decides.

Behavior 4: Embracing Accountability

Even well-intentioned team members need to be held accountable if a team is going to stick to its decisions and accomplish its goals.

Peer-to-peer accountability is the primary and most effective source of accountability on a leadership team.

When team members know that their colleagues are truly committed to something, they can confront one another about issues without fearing defensiveness or backlash. After all, they’re merely helping someone get back on track or seeking clarity about something that doesn’t seem right. And the person being questioned about her behavior or performance will be willing to admit that she has inadvertently lost her way — after all, she’s vulnerable — and adjust her behavior accordingly.

Behavior 5: Focusing on Results

The ultimate point of building greater trust, conflict, commitment and accountability is one thing: the

achievement of results. What would members of an executive team be focused on if not the results of their organization? Well, for one, the results of their department. Too many leaders seem to have a greater affinity for and loyalty to the department they lead rather than the team they’re a member of and the organization they are supposed to be collectively serving.

The only way for a leader to establish this collective mentality on a team is by ensuring that all members place a higher priority on the team they’re a member of, than the team they lead in their departments. A good way to go about this is simply to ask them which team is their first priority. Many well-intentioned executives will admit that in spite of their commitment to the team that they’re a member of, the team they lead is their first priority. This is absolutely natural, common, and understandable. And dangerous.

When members of a leadership team feel a stronger sense of commitment and loyalty to the team they lead than the one they’re a member of, then the team they’re a member of becomes like the U.S. Congress or the United Nations: it’s just a place where people come together to lobby for their constituents. Teams that lead healthy organizations reject this model and come to terms with the difficult, but critical, requirement that executives must put the needs of the higher team ahead of the needs of their departments. That is the only way that good decisions can be made about how best to serve the entire organization and maximize its performance. ●

Discipline 2: Create Clarity

The second requirement for building a healthy organization — creating clarity — is all about achieving alignment. This is a word that is used incessantly by leaders, consultants and organizational theorists, and yet, for all the attention it gets, real alignment remains frustratingly rare.

A big part of the reason for the failure to gain alignment has to do with the fact that, like so many other popular terms, people use it without being specific about what they mean.

The point is that alignment and clarity cannot be achieved in one fell swoop with a series of generic buzzwords and aspirational phrases crammed together. Leaders simply cannot inspire, inform, motivate, market, and position their companies in the context of a T-shirt or lucite tchotchke. Clarity requires a much more rigorous and unpretentious approach.

Let's take on each of the six critical questions that leaders must answer in order to create clarity and build a healthy organization.

Question 1: Why Do We Exist?

An organization's core purpose — why it exists — has to be completely idealistic. I can't reiterate this point enough. Employees in every organization, and at every level, need to know that at the heart of what they do lies something grand and aspirational. They're well aware that ultimately it will boil down to tangible, tactical activities.

Two companies that are in the same industry will often have different reasons for existing. That makes sense. However, it's also interesting to understand that two companies in completely different industries can share the same purpose. For instance, both a hospital and a masseuse could very well exist to alleviate pain and suffering in the world.

Question 2: How Do We Behave?

The word intolerance isn't often used in a positive way in society. And yet when it comes to creating organizational clarity and alignment, intolerance is essential. After all, if an organization is tolerant of everything, it will stand for nothing.

An important key to identifying the right, small set of behavioral values is understanding that there are different kinds of values. Among these, core values are by far the most important and must not be confused with the others.

Core values are the few — just two or three — behavioral traits that are inherent in an organization. Core values lie at the heart of the organization's identity, do not change over time, and must already exist. In other words, they cannot be contrived.

Question 3: What Do We Do?

This question is the simplest of the six and takes the least amount of time and energy to address. The answer lies at the opposite end of the idealism scale from why an organization exists and is nothing more than a description of what an organization actually does. No flowery adjectives or adverbs here. Just an unsexy, one-sentence definition — something your grandmother can understand. The answer to this question is something we call an organization's business definition (but never a mission statement!).

If an organization's reason for existence answers the question, Why?, then its business definition answers the question, What? It's critical that it be clear and straightforward. It should not be crafted so that it can also be used in marketing material.

Six Critical Questions to Gain Clarity

What leaders must do to give employees the clarity they need is to agree on the answers to six simple but critical questions:

- Why do we exist?
- How do we behave?
- What do we do?
- How will we succeed?
- What is most important, right now?
- Who must do what?

Question 4: How Will We Succeed?

When team leaders answer this question, essentially they are determining their strategy. Unfortunately, more than any word in the business lexicon, strategy is one of the most widely employed and poorly defined.

Essentially, an organization's strategy is simply its plan for success. It's nothing more than the collection of intentional decisions a company makes to give itself the best chance to thrive and differentiate from competitors. That means every single decision, if it is made intentionally and consistently, will be part of the overall strategy.

But that definition is not particularly actionable or useful for guiding the decisions of leaders and employees. The best way for an organization to make strategy practical is to boil it down to three strategic anchors that will be used to inform every decision the organization makes and provide the filter or lens through which decisions must be evaluated to ensure consistency. Strategic anchors provide the context for all decision making and help companies avoid the temptation to make purely pragmatic and opportunistic decisions that so often end up diminishing a company's plan for success.

Identifying Anchors

The best way for leaders to go about finding their strategic anchors is to take a reverse-engineering approach and extract them from everything that they know to be true about their organization. They need to start by creating an exhaustive list of all the decisions and realities that form the context of their current situation. This will include anything beyond the organization's reason for existence, core values and business definition.

Unlike a company's reason for existing and core values, which never change, and the business definition, which changes fairly infrequently, an organization's strategic anchors should change whenever its competi-

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tive landscape shifts and market conditions call for a different approach. How often this happens will vary depending on the nature of a given organization's market or industry.

In some cases, one of an organization's strategic anchors may not yet be on the list because it isn't part of what the organization is currently doing, so it needs to be added. That's why it's important for an organization to realize that the process of identifying strategic anchors should not be completely reactive or historical. Sometimes it is the very process of identifying strategic anchors that alerts an organization to the fact that what it is currently doing isn't right or isn't enough to ensure success and differentiation, and so a change is needed.

Question 5: What is Most Important, Right Now?

More than any of the other questions, answering this one will have the most immediate and tangible impact on an organization, probably because it addresses two of the most maddening day-to-day challenges companies face: organizational attention deficit disorder and silos.

Of course, to say that there are too many top priorities is something of an oxymoron. After all, for something to be the top priority, it has to be more important than everything else. The point here is that every organization, if it wants to create a sense of alignment and focus, must have a single top priority within a given period of time.

I had been hearing so many of my clients complain about the silos within their organizations that I decided I should try to solve that problem.

Then I realized that there was a certain category of organization that seemed to rise above the silo problem — emergency responders. These include firefighters, emergency room doctors and nurses, soldiers, even police officers in the midst of a dangerous situation.

What these groups have in common is a crisis — a clear and present situation of great and immediate consequence. What a crisis provides for an organization is a rallying cry, a single area of focus around which there is no confusion or disagreement.

The Thematic Goal (a.k.a. The Rallying Cry)

I decided that there is no reason that every organization couldn't have a rallying cry, even when it is not in crisis. I called this rallying cry "a thematic goal" because it needs to be understood within the context of the organization's other goals, at the top of the list. And so, the thematic goal is the answer to our question, *What is most important, right now?* A thematic goal is:

Singular. One thing has to be *most* important, even if there are other goals under consideration.

Qualitative. The thematic goal should almost never be established with specific numbers attached to it.

Temporary. A thematic goal must be achievable within a clear time boundary, almost always between three and 12 months.

Shared across the leadership team. When executives agree on their top priority, they must take collective responsibility for achieving it, even if it seems that the nature of the goal falls within one or two of the executives' regular areas of ownership.

Defining Objectives

Realizing the benefits of having a clear and collective focus requires more than merely identifying the thematic goal. That goal must then be further clarified by defining the objectives that will make accomplishing it possible. I call these defining objectives.

Defining objectives are the general categories of activity required to achieve the thematic goal. Like the thematic goal, defining objectives must be qualitative, temporary and shared by the leadership team. They provide a level of specificity so that the thematic goal isn't merely a slogan but rather a specific and understandable call to action. In most cases, there are between four and six defining objectives, depending on the nature of the goal itself.

Once teams identify their defining objectives, they have to take on the next, and last, step in the thematic goal process: identifying their standard operating objectives. These are the ongoing and relatively straightforward metrics and areas of responsibility that any leadership team must maintain in order to keep the organization afloat.

Coming up with standard operating objectives is not terribly difficult because they are usually somewhat obvious. In for-profit companies, they usually include categories like revenue, expenses, customer retention or satisfaction, product quality, cash flow, morale or any other issues specific to a given industry.

Different kinds of organizations have different thematic goals, defining objectives, and standard operating objectives for a variety of reasons. However, what they all have in common is that their goals fit on a single sheet of paper.

Walking away with a single sheet of paper that lists a team's thematic goal, the defining objectives, and the standard objectives would give leaders the clear focus they need to align their actions and avoid distraction.

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Question 6: Who Must Do What?

There is not a great deal to be said about this particular question, aside from warning leadership teams not to take it for granted. Although there is often clarity among executives in most organizations about who does what on the team, making assumptions about that clarity can lead to surprising and unnecessary problems.

Regardless of how clear or confusing a company's "org" chart may be, it is always worthwhile to take a little time to clarify so that everyone on the leadership team knows and agrees on what everyone else does and that all critical areas are covered. ●

Discipline 3: Overcommunicate Clarity

Once a leadership team has become cohesive and worked to establish clarity and alignment around the answers to the six critical questions, then, and only then, can they effectively move on to the next step: communicating those answers. Or better yet, overcommunicating those answers.

The need for repetition is not a testament to undue cynicism on the part of employees; it is the result of the generic, almost spoof-like communication that takes place within so many organizations.

The problem is that leaders confuse the mere transfer of information to an audience with the audience's ability to understand, internalize and embrace the message that is being communicated. The only way for people to embrace a message is to hear it over a period of time, in a variety of different situations, and preferably from different people. That's why great leaders see themselves as Chief Reminding Officers as much as anything else. Their top two priorities are to set the direction of the organization and then to ensure that people are reminded of it on a regular basis.

Cascading Communication

Someone once told me that the best way to ensure that a message gets communicated throughout an organization is to spread rumors about it. Therefore, they concluded, leaders simply out to go out and tell "true rumors." As silly as that may sound, it is the basis for the most important means of communication within a healthy organization.

The most reliable and effective way to get an organization moving in the same direction is for members of a leadership team to come out of their meetings with a clear message about what was decided, promptly com-

municate that message to their direct reports, and have those direct reports do the same for their own direct reports. We call this "cascading communication" because it begins the structured but interpersonal process of rolling key messages down through the organization directly from the leadership team.

There are three keys to cascading communication: message consistency from one leader to another, timeliness of delivery, and live, real-time communication. This starts toward the end of leadership team meetings, a time when executives are usually trying their best to get out the door. That's when someone needs to ask the sixty-four-thousand-dollar question: "Hey, what are we going to go back and tell our people?"

For the next few minutes, sometimes longer, leaders need to review their discussions from the meeting and decide which of their decisions are ready to be communicated and which are not. We refer to this as "commitment clarification," for obvious reasons. Often it's during this process that they discover that they were not on the same page about what they had decided. This will certainly take more time, but the cost of not doing it is often great. ●

Discipline 4: Reinforce Clarity

As important as overcommunication is, leaders of a healthy organization cannot always be around to remind employees about the company's reason for existing, its values, and so on. In order to ensure that the answers to the six critical questions become embedded in the fabric of the organization, leaders must do everything they can to reinforce them structurally as well. The way to do that is to make sure that every human system — every process that involves people, from hiring and people management to training and compensation — is designed to reinforce the answers to those questions.

The fact is that the best human systems are often the simplest and least sophisticated ones. Their primary purpose is not to avoid lawsuits or emulate what other companies are doing, but rather to keep managers and employees focused on what the organization believes is important. That's why a one-page, customized performance review form that managers embrace and take seriously is always better than a seven-page, sophisticated one designed by an organizational psychologist.

This point cannot be overstated. Human systems are tools for reinforcement of clarity. They give an organization a structure for tying its operations, culture and management together, even when leaders aren't around to remind people. And because each company is differ-

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ent, there are no generic systems that can be downloaded from the Internet. ●

The Centrality of Great Meetings

An organization that has embraced each of the four disciplines will certainly become healthy, making success highly likely. But one activity, more than any other, will be central to maintaining those disciplines and sustaining health.

No action, activity or process is more central to a healthy organization than the meeting. As dreaded as the “m” word is, as maligned as it has become, there is no better way to have a fundamental impact on an organization than by changing the way it does meetings.

So what kinds of meetings does the leadership team of a healthy organization have? There are four basic types: daily check-ins, tactical staff meetings, ad hoc topical meetings and quarterly off-site reviews.

Whenever executives challenge me about the practicality of having four different meetings on a regular basis, I ask them to add up all the time that they would spend in those meetings in a given month.

If we apply the model in the most time-intensive way possible (a full 10 minutes each day in check-in meetings, 2 hours each week in tactical staff meetings, 6 hours each month in topical meetings, and 2 days each quarter in developmental review meetings), the grand total of time amounts to about 1,560 minutes, or 12 hours per month.

Assuming a 50-hour workweek, that amounts to just 13 percent of our time. If you work just 45 hours per week, then it's 14 percent. That means even when we're spending the maximum amount of time at each meeting, more than 85 percent of our time is still available for whatever else we do.

Finally, it's worth asking, *What else should leaders be doing besides going to meetings?* E-mail? Analysis? Customer visits? OK, there are certainly times and places for these. But a leader's first priority is to create an environment where others can do these things and that cannot happen if they are not having effective meetings. The truth is, if executives are having the right kind of meetings, if they're driving issues to closure and holding one another accountable, then there is much less to do outside meetings, including managing their direct reports. ●

Seizing the Advantage

As more and more leaders come to the realization that the last frontier of competitive advantage will be the

transformation of unhealthy organizations into healthy ones, there will be a shift in the mind-set of executives away from more technical pursuits that can be delegated to others and toward the disciplines we've outlined here.

There is just no escaping the fact that the single biggest factor determining whether an organization is going to get healthier — or not — is the genuine commitment and active involvement of the person in charge. For a company, that's the CEO; for a small business, it's the owner; for a department within a company, it's the department head.

As tempting as it may be, leaders must not abdicate or delegate responsibility for communication and reinforcement of clarity. Instead, they have to play the tireless role of ensuring that employees throughout the organization are continually and repeatedly reminded about what is important. And they must be on guard against contradictory and inconsistent processes that can confuse employees and against bureaucracy that can creep into an organization when people get complacent.

If all this sounds daunting, it's because it is. People who lead healthy organizations sign up for a monumental task — and a very selfless one. That is why they need to relinquish their more technical responsibilities, or even their favorite roles, that others can handle. Because when an organization is healthy (when the leader at the top is doing his or her most important job), people find a way to get things done. When an organization is unhealthy, no amount of heroism or technical expertise is going to make up for the confusion and politics that take root.

At the end of the day, at the end of our careers, when we look back at the many initiatives that we poured ourselves into, few other activities will seem worthy of our effort and more impactful on the lives of others, than making our organizations healthy. ●

RECOMMENDED READING LIST

If you liked *The Advantage*, you'll also like:

1. ***Bury My Heart at Conference Room B* by Stan Slap.** Slap provides a remarkable process that allows you to use your own values to achieve tremendous success in your personal and organizational goals.
2. ***Breaking the Fear Barrier* by Tom Rieger.** Fear compels employees and managers to protect themselves by creating seemingly impenetrable barriers. Learn how to overcome the barriers that plague your company.
3. ***The Performance Pipeline* by Stephen Drotter.** Readers learn how work flows from top to bottom and reveals what results each layer must produce and what each layer must pass down to make the layers below successful.