



031: It's Not About Balance, It's About Blooming with Dan Pontefract

Carolyn: Dan Pontefract is a renowned leadership strategist, author, and keynote speaker with over two decades of experience in senior executive roles at companies such as SAP, TELUS, and Business Objects. Since then, he has worked with organizations worldwide, including Salesforce, Amgen, the State of Tennessee, Nestle, Canada Post, Autodesk, BMO, the Government of Canada, Manulife, Nutrien, and the City of Toronto, among others.

He's an award winning and best selling author of four books. Lead Care Win, Open to Think, The Purpose Effect, and Flat Army. His fifth book, Work Life Bloom, will be published in October 2023. Dan also writes for Forbes, Harvard Business Review, and other outlets.

My guess is that you've completed a workplace engagement survey before you're going to hear in this conversation with Dan, why those engagement surveys aren't necessarily measuring the right things. In fact, they're missing a big segment of what's really contributing to how people show up at work.

Join us in this conversation as we talk about Dan's new book coming out later this year in 2023. His new book is called Work Life Bloom. And in this conversation, he will share data and insights from this book. And I really, really believe if you lead people, if you work in an office based setting, you're going to get some really interesting nuggets from Dan.

Enjoy the show.

Hello, evolve listeners. I'm really excited today. Well, who am I kidding? I'm excited every day to do this podcast, but today is an extra special bit of excitement because our guest today is Dan Pontefract and Dan welcome.

Dan: Marilyn, hello. Thank you so much. I've been dying to come on this show.



Little smack and shop with you.

Carolyn: Exactly. Well, let's just kind of, I'd like everyone to know Dan holds a very special place in my heart because when I wrote my first book and I still remember this moment and I probably tell you every time I see you, Dan, but you called me. Well, first of all, you graciously accepted my invitation when the scared newbie.

Approached you at an event and said, Hey, Dan, I know somebody, you know, would you write the forward to my book? And then promptly gave you a hot mess to review and you graciously accepted that offer. But what really stuck with me was when you called me the day the book was launched, onto Amazon and you made me feel so seen so valued and so special.

And that like one minute phone call really, really Set me on a trajectory to realize the small impact that we truly, truly can make in people. So that's, you know, you got a special place in my heart, Dan.

Dan: and all, all because I pocket dialed. It's just

Carolyn: exactly, and you made up some really nice stuff on the spot.

Dan: Oh, this is Carolyn and it's right. It's book. Yeah. Remind me,

Carolyn: but yeah, I mean, so Dan, you are a prolific author, writer. you know, you are, are not shy in sharing your perspective and I think it's a really balanced perspective. And today on the show, we're going to talk about your newest book that's coming out in October.

It's work life bloom.

Dan: No, no, no, no, no. Yeah. There's a lot to unpack with a title. Sometimes I like playing Jedi mind tricks with book titles. And so maybe we'll get into that, but yes, work life bloom, how. To nurture a team that flourishes a lot of growing metaphors in there. Yeah.



Carolyn: Now, right out of the gate, let's talk about this term work life balance.

Cause you pretty much start right out saying that's not it. Can you tell us a little bit more about why that is? Cause that term's used all the time, all the time.

Dan: that's myth number one of three. I'd, I'd love to get into you with, work life balance. It's really should have been called work life imbalance because that's the point.

it's a zero sum game, work life balance, because you immediately will fail because there's, there's no such way in which to balance them in so much as. If you try, you will feel futile because you're subservient to one and not the other, or you're overcompromising on one and not the other, and so you'll feel guilt.

I think of it this way, at least the research that I've been doing, work is one rope and life is another rope, and they're different colors, and we need to find a way to knot the two ropes. They're unique. K K N O T. Yeah. Nicely done. Yes. Yes.

Carolyn: Like tie them together. Right. Yeah. Because you know, for those of us who do have children, I think that's where it particularly showed up for me is all of a sudden I have these little ones to care for.

It's like, holy shit, which way, which way do I go when I'm in one place I'm, guilty. And when I'm in another mindset, I feel guilty there as well.

Dan: Yes. And so if we come to the conclusion, particularly as a leader of self, we all are that. And then if you're lucky enough to be a leader of teams and others, I argue you have a fiduciary responsibility as a leader of others.

To be empathic enough to see that work and life are separate, but also to do something about the work and the life. Because as I've said, I don't know, now a thousand times over the last two years of writing this book, our lives and our work are unique. But they do affect one another, and if they affect one another, then what are those factors in work that get transposed over to life?



And when I say life, Caroline, I'm not talking about, what name do we give the new puppy?

That we just adopted or should we have a garage sale on Sunday, right? Those are not what I'm talking about, or can I balance a checkbook or not? Right. I'm talking about the character, the development of self. And so there are life factors that get, woven into work that we should be thinking about as leaders because they easily get transposed into life as well.

And so at that end of the day, I think there's this, yeah, responsibility for the leader to have conversations about work and life and how to potentially tie the knot between the two better.

Carolyn: And I can see how this is going to help and also challenge people in their thinking, because in my experience, and I was part of this sort of mindset for a while is you know, you leave your home life at the door and then you need to show up at work and leave that all behind.

And I think. This is going to help people. Tell me, can you actually, I don't know, like, there's so many things that I want to ask about that. I'm just going to pause here. Has that been your experience as well? This sort of binary, leave one behind while the other one shows up.

Dan: So the answer is yes.

And, uh, oh, the yes is here. I am a 52 year old middle aged, I guess, I hope still a white male. And what I've, what I've seen or last 25 years of working in organizations, whether as an executive or as an adjunct, in the last five years, helping out other organizations is that there's a lot of, whether you're male, female, or otherwise, like checking your, yourself at the door, wearing a Teflon suit so that nothing sticks and it's that adoption of a different persona.

That's not who you are because it's the work you, and it's, it's terrible to see because, which actually is a great segue to, to point number two, I'll get to the Oh, myth. Number two is these organizations, and this really exacerbates your



question, your point, repeatedly say, Oh, we want you to bring your most authentic and whole self to work yet.

What do we do? We, we don't. We don't allow that or we don't create the conditions for that to happen, or we may not reprimand, but we're certainly not emboldening that concept. And what do we end up with? We end up with people saying, Hey, Mr. Mrs. Irony, you told me I could be my most authentic self. You said that I had to wear a long sleeve shirt because the tattoos that I have on my left arm, which are of my kids and my upbringing and my Irish nationality.

You say that I can't show those at work. So how can I be my most authentic, true self, whatever, if you're telling me where a long sleeve shirt, that's just a little example, of course, right? But that sort of best self authentic self nonsense exactly points out my point. Number one that you've raised the, Oh, by the way, is I am definitely getting the vibes from my direct research and focus groups and so forth that, change is a common.

And this is not to get all curmudgeon Dan, the Gen X looking at Gen Zed and saying they're crazy. They're not, they're actually what we need. And so even young millennials and Gen Zeds in particular are actually demanding in various ways, sometimes in, interesting ways, but they're demanding that we be more empathic and honest and true.

In the conduct of where we have and take place with our work. So that's interesting. I will say, and there was a

Carolyn: piece in your book. maybe we'll come to it later because I, I don't want to skip over this next part, but I noticed that some of the data, showed that and I'm with you. It is sort of an, uh, oh, that has a bit of, you know, tension between that good.

Oh, and like, uh, oh, to it. But, you know, I have kids in that generation and I see it with them every day. And I think.



Dan: Well, I got to get out of myth number three, by the way, because it all, it all, it all makes sense. Once I point out the work life balance, the best self, most authentic self nonsense. And this third one, which is I'm guilty of as well. So I'm looking back and I'm first to say, I've made tons of mistakes as a leader, as a parent, as a spouse, but employee engagement.

Is one that I'd like to have my mulligan on when it comes to organizational culture. So here's, here's my thing for whether it's Gallup and Hewitt, whoever, blessing way, great place to work. We have been. Asking the wrong question for 20, 25 years,

Carolyn: what questions that,

Dan: well, the question we're asking is, are you engaged at work?

There are sub questions that, you know, the Q12 for Gallup and the say, stay, strive for Aon Hewitt and others, right? So they'll feed this sort of logic based summary of, are you engaged or not? But that's kind of the question we've been asking. Are you engaged at work? And if you're not engaged, then you're not engaged or you're chronically disengaged or the house is on fire, kind of disengaged, right?

So I have to ask you and listeners and viewers, et cetera, anyone with a pulse, why are we only asking about engagement at work and does engagement even make sense because if we're trying to help people quote, With work life balance and be their best selves and we're not factoring in life. Number 1 and number 2, we're eliminating the possibility that we might be engaged, disengaged and semi engaged over a period of 5 years because of things that happen in work and life.

Acquisition, new boss, new teammates, move cities, lost a parents, gained weight, have a serious affliction to some sort of internal ailment that I didn't know. All of this can affect you. Yeah.

And it's not reflected in that question



at all. Not at all. And so that's why I reverse engineered work life balance, best self or most authentic self and employee engagement said.

Okay, wait a second. What if we rearchitected the whole thing and asked, are you blooming? But if you're not blooming, that's okay. You're just in a different persona between kind of the computation of work and life. And so how can we have an honest conversation as a leader with the team member about how you're feeling?

In work in life, and then what can we do about it? Maybe to help you and

Carolyn: that leads to being seen being accepted for where you're at. Because when you were sharing that example, what came up for me is the times that I did not complete the employee engagement survey. This is like a confession. there were a few times they didn't complete it and they were at certain points in my life, where I wasn't blooming.

I was in a different place and the guilt that I felt for not completing it because I'd always been, you know, I think a very good corporate citizen, but it made me feel angry and disconnected and just again, not seen. And so that. I love where you've gone with work life bloom and maybe, maybe we can go to that, that, quadrant that you created that, that shows, you know, those six different, elements that are in work life factors.

I just think it's so beautiful.

Dan: Well, thank you. And it just so happened for those that, are listening and not watching. There's a thing, imagine a two by two matrix and on the. The y axis is work and on the x axis is life. And so on the y axis, up at the top is work is amazing! At the bottom of it, it's awful.

It's pretty simple delineation, right? And then on the life, x axis, life is very clear. So, i. e. the character, myself, like who I am. Or it's confusing, like I'm not knowing who I am. And so, the goal... Is, of course, to bloom as often as we can. That's the top right where work is amazing and life feels clear.



But as I am evidence of, you cannot be blooming 100% of the time. I have been in the 3 other personas and 3 other personas quickly are. When work is amazing, but I'm less confident, if you will, I'm kind of confused and who I am as a human being, as a, as a, with my life factors, then I'm budding. That's the persona name.

So I'm budding. It means I'm close because work is going really well, but I questioned some of my own, you know, self character, habits and attributes on the bottom right of the two by two is what I called stunted. So just like a plant, it needs some help, right? To get past the, almost like a dormant phase.

And they need to, if you want to get to blooming, that's where your leadership come in and say, well, what's going wrong here at work? And the X factors there from a work factor perspective, but life is going pretty good. So the life factors are well, so you're stunted, but then renewal. Which is really the best of the not very good, but I've been in renewal several times and that's when work feels awful.

I'm kind of confused with my life factors. And so I just need a reset that may not mean I need a new job or a new company or a new spouse or a new home. That's not what I'm getting at. It's that there's a definite need for reflection to sort out. Why a couple or maybe most of those factors aren't working for me.

And what can I do maybe to get back up to either budding or stunted or hopefully blooming. And

Carolyn: so the idea is, is that you pause and reflect and see where you are. And then when you realize where you are, you can put some steps in place to ideally get you back into blooming.

Dan: Yeah. So let's imagine you're a mid level manager, right?

You got a team of six, you know, you're in financial services and your team of six does things for internal clients. Let's just call it that. And so you've got six people and they may all have a, well, that wouldn't be quite right, but they all



have like a different persona. So a couple of them are blooming, couple of them are budding.

One is renewal. One is stunted. What does that mean? Well, it means that their interpretation at that particular stage, whether they're Gen Z, Millennial X or Boomer, whether they are, 5 years, 10 year or 20, whether they have just moved to Toronto or L. A. Let's say. And or they've lived there for 15 years.

Like there are so many different factors in the work and the life. That's going to say, Carolyn, am I blooming buddy, budding, sorry, stunted or in renewal that the leader needs to have that conversation about, well, what's in the way or what's going well, and both are important questions. Yep.

Carolyn: Yep. and the simplicity of this too, I mean, leaders are, as we know, carrying a lot of a lot of different pressures on them.

I found this really easy to put myself in and simple to understand. I'm curious if your data showed any sort of, I guess, were there certain generations that were sitting in certain boxes where it was like, I think of my younger self as budding where life I didn't really quite know who I was.

I thought I was maybe something in my mid 20s, late 20s, but feeling like great with work. Did your data show any patterns like

Dan: that?

It did. And, you know, there's not a huge gap between Gen Zed and Boomer, for example, in terms of how many people or percentage of people that are each of the four personas, which I think is good.

Now, I do have some data points I could show you, because there are some other alarming, data points. So here's I'll show you just here's the global all team members. So 10, 000 people globally for those that are listening in, 11 countries, half of them were leaders, half of them were non leaders.



And so what I discovered at that moment in time, so a 3 month survey conducted in the fall of 2022. With all those aforementioned data, characters, 41% of the people are blooming, 38% are in renewal and kind of nine and 12 each and budding and stunted. So you're like, okay, a moment in time, four to 10 people are blooming pretty good, but also four to 10 are kind of in renewal.

So not great, I guess. Like I'd certainly love to see more people blooming, but I'm actually not surprised in the slightest that on a global scale, you know, four to 10 people are blooming because again, like if you think about it, just like engagement on a, on an international scale, two out of 10 people are quote engaged.

Why are we asking a question? Well, what's going on for me, at least the model I've come up with budding, stunted or renewal, what's going on for them at that moment. So can we have these conversations as opposed to, are you engaged or not engaged? How about conversations right about, well, well, how can I help you?

So now a couple of other data cuts, because when you talk about generations of like, yeah, they're pretty close. I should have a graph for you. But I don't, and I'll make that, amendment next time around. I do a live show with someone, but here's, here's a male and female cut. Now we didn't have enough sample size, by the way, for, gender neutral.

So just those that asked, so we only had about 40 people characterize themselves as non male or female. So that's why you only see male or female here, but look at this 50% of males globally are quote, blooming 32% of females. And subsequently, the number of people in renewal are less for males, 31% and 46% for females.

So to me, all of a sudden now, I'm like, Oh, right. There's a lot of, fundamental attribution error happening with males. Whom are like, of course I'm blooming. Everyone else will be blooming. Like, right. It's like half of the men are quote blooming, but only a third or less than a third of females are quote blooming.

So there's something to be said about that, Carolyn, right. About what we're doing in organizations that actually are harming more females than males. When



it comes to whether or not we're creating the right work life factors. I'm just going to last one. And then we can chat about all this is leaders versus non leaders.

And this is frightening. So 48% of leaders. So leading a team, by the way, not leading self, leading a team of whatever number 48% are blooming and only 26% of non leaders, i. e. individual contributors are quote blooming. And look at the renewal ones, right? 33 to 40 or 51%. So that's my global research. And I'm like, again, alarmed, but not surprised.

And I think it goes back to, well, what are we asking the questions, right? the budding renewal, stunted blooming 2 by 2 matrix then allows for leaders to have a conversation about those work and life factors, right? And that's what we should really be doing

Carolyn: now. I'd like to get to those factors because that does help leaders.

It gives them a little bit of guidance of where to talk about. what were you surprised with in your research? Cause you know, you mentioned there, I was surprised, but not surprised, but did your research show anything that you were like, Holy crow? I had no

Dan: idea.

Well, certainly the, the ones that I showed there, right.

The, the leaders versus non leaders gaps, as well as the male versus female gap. there were a couple other gaps that I thought were just like, like horrific. one of them was, certain countries. So, you know, like the Netherlands versus India, there's like a gigantic gap between people blooming in India versus people blooming in the Netherlands.

I mean, the Netherlands were the Netherlands or in South Korea were the lowest, whereas India was the highest. And the gap was like a 20 point spread. I was like, Oh, that was, that was kind of really interesting. And then when you kind of look at some of the data points as well, on some of the certain factors,



right, there was certain generational gaps as well, where, as an example, you know, well being so well being as a, is a stark difference between, a baby boomer versus a gen Zed and gen Zed have a higher sense of wellbeing than a boomer.

Which you can appreciate because, you know, Gen Z's are younger and they're probably more full of vitality and a sense of, Rigor for anything in life, whereas boomers are, you know, at the other side of the shadow and, you know, having to think through a lot more wellness and wellbeing things, which again, if you're a leader in an organization, and I suggest to you that you do need to kind of understand a little bit about the makeup of your team, because certain conversations are going to be different if you have those, generational gaps on your, on your crew.

Carolyn: Now, can we talk a little bit about those factors?

Dan: Yeah.

Carolyn: Underneath, work and life. How did you come up with them?

Dan: Well, I, oh, okay. So I didn't just wet finger the sky and hope these ones were awesome, right? That'd be terrible. So leading up into the global research that I did, I went back and I'm very fortunate, to have conducted 15 culture assessments for 15, like, humongous companies.

So my job as a consultant is... at times is to go into organizations and whether it's financial services or academia or public sector or high tech, whatever it is, I go in and I, I open up the, the kimono, so to say, when I'm hired to say, okay, what, what's going on with frontline mid management and senior leaders.

And I'll do 1 on 1 interviews, focus groups and company or organization wide assessment surveys. And I've done 15 of these. So between the years, 2015 and 2021, I was like, geez, Carolyn, I'm an idiot. Like why, when I've been looking at this data, in summary and looking for the trends. And so I spent months.



Combing through all of this data from 15 companies in North America. So bias alert, right? It wasn't Europe or Asia, but at least I'm on the right track. I think with the number of entries I had, and there were people I assess and talk to. And so like trends developed, like trends developed from the perspective of what makes me tick.

And a lot of these points when these focus groups, et cetera, where like, I just wish I could be human. I just wish I could bring my best self here. I wish I was heard. I wish that I had more relationships. I wish that people cared about my skills. I wish that the company did work life balance, but they're not.

And it just like, I was in a. A tsunami of feedback and, rise for help.

what I've seen in, in the assessments that I've, I've done as well and looked at. so that led you to the 6, the 1st, 1 being trust, I presume.

Yeah, yeah, is exactly it. So they, I didn't mean these to be necessarily in some sort of hierarchical order, but it felt good to start with trust nonetheless on the work factors.

So trust was, you know, table stakes for many. Necessary for their, them to feel like they had a chance to shine or to bloom or to flourish, what have you, but then, you know, the others, again, they're not, they're not weighted, but belonging. So those kind of accumulation of these positive experiences that help people feeling understood that they help, they're, they're, they're safe, they're represented.

so belonging was a huge part, but then, you know, the twin sister, if you will, of belonging was value. Do I feel appreciated? Do I get recognized? Do I, does my boss, my team, my boss's boss understand. My impact, my effort. And this is sort of like, almost like Maslow's hierarchy a little bit. It's self actualization when you feel valued, right?

You strut your stuff, you're kind of a peacock with the feathers flowing. And it's like, fantastic. Right. and then purpose, strategy, and norms are really organizational domains, right? Purpose is does the, does the company or the



organization state its intentions? uphold its beliefs and basically, act to help society and the community and so forth.

So am I, do I believe in my company? Do I believe my organization? Or is it a lot of, greenwashing or purpose washing? Right. and then strategy norms. So strategy is effectively like the direction and understanding the priorities so that I'm not lost sheep. Right. Are there guardrails? Do I get reminded to do, do we know how my delivery of my job, my objectives, my actions actually impact the overall strategy is my boss connecting the dots.

So that I'm not a lost sheep. And then does my boss and my team create frictionless norms so that I can get my stuff done? So like, what are the cultural norms? So that's a business processes. We interact, collaborate, you know, and so on. So those, those six are so critical. And to be clear on the model here, Carolyn, five or six of the work factors and five or six of any of the life factors have to be in a net positive for you to be blooming.

That's what we found. Meaning, yeah, but it's any combination. It doesn't mean you have to have all of them. It's just five or six in each of them that, and that's important because that's 83% of all the work and the life factors. And that's kind of like, well, when you're in those engagement scoring lands, anything above 80 is considered engaged.

So we're like, when I was working with some of the research scientists, we're like, yeah, that, that makes sense. Five or six of these. Yeah. Now you

Carolyn: commented in the book too, that we're in a trust recession, which is kind of like the foundation, right. Of what we need in work. How did that, like, how did that impact the life factors?

Do you think, which I know we haven't talked about the life factors yet.

Dan: Well, you know, what I say in the book is I pay homage a little bit to Winston Churchill. There's a line in there. I use our lives shape our work. Nevertheless, our work shapes us. Yeah. And if you don't feel trust in your interactions that you and you and your boss and your team are able to be



authentic, consistent, trustworthy advocacy for one another, how do you feel when you quote, you go home or you talk to your neighbor about, you know, your team or your boss, that's the weight that we bring back into our life is that if you feel that you're not being treated, As an advocate or someone's not advocating for you, like you'd sort of start losing out on some of your own humanity when you're off work or after work or in community, and it's a huge deal.

Like it's a huge deal. You don't have to like your job, but you certainly, certainly should feel trust, trusted in doing it. Right,

Carolyn: right. So you're impacting everybody around you and people like, you know. Our nervous systems talk to each other. We can feel, we can feel that we can connect to that. So I, I absolutely agree with you on that.

Dan: Yeah. And, and again, like I say, there's a trust recession. I didn't say it was eliminated, but just like any recession, there's hope. And, and what's come to me in the evidence, right. The data and sort of the surveying and the focus groups and so on, right. Is that leaders have glossed over on this idea called trust.

There's like an assumed trust. Oh yeah. Of course, the employee, the team member will trust me because I'm trustworthy. I'm the boss. Actually, there's an investment needed to get out of a recession. So that's kind of the point. It's like, what are we doing as a leader to invest in this trust work factor so we get out of the recession?

Carolyn: Oh, so many places we could go with this. I want to come back to the belonging, Area that you talked about. And I know in your book, this is where some of the data for Gen Zed, I like to say Zed because we're Canadian. Exactly. where Gen Zed sees things a bit differently. Can you, can you expand on that?

And again, Why is belonging important for those who think that it might be a little bit too



Dan: fluffy?

So again, the three key points that I'm making within the belonging factor is people need to feel understood, represented and safe. And when you're Gen Zed, and I'm not clearly by the hairline and the wrinkles, but I do have three Gen Zed kids, and I've spoken to a hell of a lot of not just their friends, but others in these focus groups, et cetera, trying to get a better understanding.

Effectively, they, they have a cohort mentality to begin with, and you need not look any further than somewhat obviously TikTok. And. If you look at a hashtag called fun employment, for example, which is 97.4% primarily ordained by Gen Zed, the fun employment is Gen Zed, like looking out for one another, creating that feeling of being understood, represented and safe to say things about their unemployment, but to call it fun employment and to work with one another on opportunities.

that might, like, get them a new job or a new company or whatever the case may be. That's just a little microcosmic example. Yeah. So the DNA that, you know, us Gen Xers have created in the kids is good. But we need to recognize what we've created and because they're storming the organization with this new mentality, this new behavioral mindset that they're a hive, they're a cohort and they themselves feel to each other, understood, represented and safe because they can be themselves, but they're coming up against millennials, Xers and boomers whom have been preordained to have this, let's just say, Maybe non belonging attitude.

Carolyn: Yeah, or just like pay your dues, put your head down, figure it out, push

Dan: through.

Yeah, it's like career ladder versus career mosaic. So, we have been conditioned, when I say we, I mean, Xers like you and I have been conditioned, right, or Millennials like you, to, to... I'm an Xer. You're on the cusp, I'm assuming.



You're probably right on the cusp. So, we've been conditioned to grow the career ladder, so to say, right? Right. or I mean, climb the career ladder yet. What we need to be thinking about is this mosaic, and it pops up actually in the, in the life factor called skills, where I say, what are we doing to create a skills ecosystem, like an operating system inside the organization, so that the life factor of skills is actually helping the individual see that they're more than just their job, and that we're building out their life, if you will, by helping develop different skills, Thanks, Different opportunities, gigs, et cetera, et cetera, et cetera.

That actually helps a sense of belonging because now you're investing in understanding who they are to help them feel understood, represented, and safe. That it's not just a ladder they should be climbing, but building a mosaic.

Carolyn: Yeah, I really identified with that 1, 2, when I read it. and as somebody who exited out of the workforce for 2, Matt leaves, and they were shorter, Matt leaves, they were both only 4 months.

it's still. Yeah, there's a lot going on at that time. it's still felt, though, that I was going to be judged differently. and you do, you sort of have to, like, you can't ask the game to. If I just kind of look at it on the playground or in a game, you can't put a pause on the game for everybody.

Well, you step step away for for a timeout. I really struggled with that. I really, really struggled with that. And in essence, I had to put, you know, almost like 10 years, a whole decade on on a bit of a slower pace, shall we say, just given what was going on in my in my home life. I won't say it was a full on pause.

But I didn't feel seen. I didn't feel understood. And then it was just like, Oh, I just can't keep up with everyone. So the mosaic mindset is, I think just so much, again, it just creates a space to one feel safe, that you belong, and that there isn't a competition and that you're not going to be, held back because of it

Dan: or even, or even reprimanded.



I mean, I I've come across situations, Carolyn, I'm sure you have as well in your work where the boss. Questions the team member who doesn't want to climb the ladder and they're just looking for what I call horizontal ignition or horizontal experiences to further their sense of valued, further their sense of skill that's actually helping their wellbeing because they're not interested in up.

They're interested in across. Yeah. So we need to embrace that, not reprimand it. Not everyone wants to go up.

Carolyn: Yeah. And well, and sometimes when you go up, it comes with a lot of unexpected, things we won't even call it rewards. I was also, you know, you talked a little bit about being valued and I've seen that come up a lot, especially over the past year, I'm not feeling valued.

And, and, you know, I know on the other side that yes, there are. Things happening to try and address that, but they're not necessarily resonating with with folks. What did you like? What do you think prevents leaders from valuing employees?

Dan: How much time do we have? When you're valued, you're thinking about, a lot of people said this in the, in the global research I did, like certainly, compensation, like total compensation, total rewards, if you will, like, am I, am I paid fairly, but am I.

Recognize from a benefit perspective of what it is that I contribute to this organization. So that's non monetary things. So that could be things like I might value for my time, which is a big one. So, again, when we espouse work life balance, but, you know, we're, we're, we're forcing people into the office 5 days a week when surely they could come to some sort of integrated balance between 3 or 2 days in the office.

Like those little things, get you to feel unvalued. Is that a word when you're not, when you're not appreciating, the time that people have, because there's only 160 hours a week. So that's like, that's, that's one, but then you kind of get into, as I say, like. recognition and, and efforts about, feedback or, you know, making the time, if you will, to have good conversations that are open ended that are



having discussions with, you know, the individual about performance, but life as well, like when you're feeling valued.

I call it a gratitude attitude, right? It's cheeky way to just say, like, how do you appreciate and recognize people? And are you doing it in a consistent and constant way? Yeah. So, you know, it's so easy to, at the end of the day, yes, you could buy someone a coffee or have lunch with them, but it's free. Like, really, at the end of the day, it's free to recognize and acknowledge people for both their efforts and constructive feedback and the performance and helping them, you know, develop a skill to tie in, you know, one of the life factors when we're talking about being valued or feeling valued.

Now, you

Carolyn: mentioned compensation there, and I know pay can always be a bit of a, a touchy subject, but you wrote about this concept and I'm with you 100%. This notion of posting pay bands. And being, more transparent about what those bands are. And so for those, those of you listening who maybe haven't had the pleasure of working in that space, but knowing that, but, you know, have, there are, there are jobs that are organized in certain categories and it's, it's meant to be a system that brings a little bit more equity and transparency to how people get, remunerated.

How do organizations do this well by it? Posting those pay bands and being transparent.

Dan: So, it's, it's probably a, a dream of mine, but the, the large enterprise, you know, companies, I think still will continue to struggle with this because they've been stuck on, effectively like collusion. Yeah. Right. And so they want to be there. They get, they can get into hot water because they, they should be posting them.

Right. Let me just call it out, like post the pay bands, just at least the pay bands, like, so that people can see where they, they, the range that they, they land. And it's always, it's not always, it often is this secret. It's like the Illuminati of what the compensation pay bands are. So first of all, I, I agree like that will help you, as an individual say, oh, so the range is 70 to 90.



Okay. And I fit in here and then having conversations about, well, why do I fit here and what's the deal? But oftentimes these organizations don't yet. The irony of course, is like in public sector, they are like, they're mandated to post a pay band. And so it's just like, well, why do we need secret society and much of the corporate world, particularly large enterprise yet public sector will post the pay band, let alone what they often call the sunshine club is saying who makes over a hundred grand in a public sector.

I'm all for that transparency because it's coming anyway. And it's like an expectation. When I say coming, it's like expectation of gen Zed back to the point. He's like, what, why aren't we doing it? It's like, I don't understand. Of course we should be posting these things. You

Carolyn: can see the real shift back to this collective mindset and sort of a community based mindset.

Now, I wanted to dwell a little bit more on the work factors, because, well, just because I was curious, but I know there's the 6 other life factors, that influence that X axis. Do you want to just, take a bit of time now, Dan, and share what those are?

Dan: Sure. Go back to handy diagram here. So those listening in the, the six are, one sense of meaning and I'll come back to meaning versus purpose in just a second.

So sense of meaning, one's relationships, connections, network, one's sense of wellbeing or wellness. Number four is skills. Your development of self, particularly and five and six are agency. So that sort of empowerment of decision making and the autonomy and self determination, and then number six is respect.

So the, Appreciation of who you are for what you bring to the table. Why do I call them life factors? First of all, because arguably you could say, well, Dan, these are just additional work factors, aren't they? yeah, I mean, you can make that argument. I wouldn't disagree. But where I found it very advantageous to say is that these six life factors.



are malleable between work and life. And so if we're working on these pun intended, I suppose, developing these life factors as a boss, as a team for the team member, these are the critical ones that are going to be deployed in life. But they're also going to be deployed at work. So I'm not saying they're more important than the work factors, but the work factors really have a lot to do with work.

Am I trusted at work? Do I feel like I belong at work? Do I feel valued at work? Do I understand the purpose of work? Is the strategy of work connected to me? And are there norms that allow me to have frictionless operating procedures? So those are slightly transferable to life. Like I bring them home cause I think about it, but I'm not applying them in life.

The six life factors, meaning relationships, well being, skills, agency, and respect, they're all applied in life and I bring them into work, so that's why they're pretty key, and that's why it's a two by two matrix with X, the X, X axis, I'm so sorry, as the six life factors, so, you know, This is that back to that point about the fiduciary responsibility.

If you're not having a conversation, as an example, with your team member about their relationships, not marriage or what they're doing in terms of spousal or non spousal or that I'm talking about, like, People you connect with to build up that network, i. e. My network is my net worth. If you're not having a conversation or at least helping Carolyn, the team member, Dan, the boss in this case to say, Hey, Carolyn, just want to have, like, I know some people here.

I know they're based in Burlington and Oakville and in between those two cities. Hey, I think you'd be really good match. can I introduce you to Sally or Adam or whoever? Carolyn would be like, I'm sure you're like, Oh, cool. Thanks. That's amazing. But even inside the organization, this is where it gets a little bit slightly convoluted, but I'd be like, that's the relationship life factor is you helping the team member to develop the skill of relationship building and to advocate for those relationships.

So it could be inside the organization. That's totally cool because maybe the skills that you're developing get transferred over to the life factor post work, or maybe that relationship that's been developed at work because of that



introduction. Turns into a life relationship. How cool is that? Right? So again, I can argue, for those that wanted to counter argue that these are just six additional work factors, but I'm actually saying these are six life factors to begin with, but they get transposed into the work.

Because we pay attention to it as a leader, and that's a good thing.

Carolyn: Well, and what came up for me is it's really what grounds the knot, the K N O T. Ah,

Dan: nicely done. Yeah,

Carolyn: and I think, you know, I'm thinking of the times when I was a leader in an organization and how my ability to To amazing on those work factors was very much impacted by what was happening in my life factors.

And, you know, back to that fiduciary responsibility or that responsibility, I guess it's a humanity is how you show up when you're a leader. You, you really, like, you don't leave people, you don't leave people's presence in a neutral state. Like everything that you do will impact others around you. And so that's what really stood out for me when you were, when you were talking about those factors.

Dan: Yeah. And I thank you first of all, Carolyn. I mean, that's amazing feedback and I couldn't agree. Honestly, I couldn't agree more. I mean, what we're, what we're kind of getting at here with the work factors or sort of the life factors we're saying, okay, look, if you are, A boss. And, or, like thinking about the organizational dynamics of, you know, the entire company or unit or whatever the case may be.

Those six life factors are actually table stakes for what we weren't doing with work life balance or employee engagement. Yes. And, and that's kind of like the aha moment for me, my own myopia. Inside of organizations I've worked for working on employee engagement was like so fixated on what the work factors were.



And again, you need them, but these Self development, like character, self factors, the life factors are so equally important that I was missing a huge piece to the conversation for years and I'm trying to maybe, undo an error, that, that, that I've made over years. Or to pay

Carolyn: it forward. ,

Dan: maybe I'll dan it forward.

That's what I'm doing. Dan

Carolyn: it forward, Dan it forward. Well, and it's, you know, it is really difficult. Obviously being a leader now is quite different even than five years ago or three years ago. and so I think again, this k n ot, this knot of bringing it together and this real

Dan: shift attribute you every time now T ot, Carolyn sra, K N O T, Carolyn sra, I gonna put it like a little.

Diagram underneath it. Now, I

Carolyn: love it because you do like you hear this word like work life ballots and I've, I've really struggled with it. And, and so now I, I proudly attribute work life bloom, because we, and we can't bloom all the time. I think that's the other thing, right? And there's a garden analogy through, through your whole book, but there are seasons where you need to, go underground, so to speak, and you need a bit of time for things to, get nurtured and, and strengthen.

And so I'm guessing that was purposeful as well, why you chose the word bloom.

Dan: You know what? I was, about two and a half years ago issue is February of 2021. And I'm sort of in the midst of architecting this book and it wasn't quite work life bloom at the time. Certainly it wasn't. but I was on a bike ride and there was like these, flowers peeking out February in Victoria because it's Victoria.



And I'm thinking to myself, those daffodils, gosh, they're gorgeous. They're blooming. And I was like, Oh my God. There it is. Why are they blooming? Right? There's soil. There's nutrients. They got water. There's sunlight. It's seasonality. Somebody, whatever it is, someone's helping these things grow and bloom, but they don't stick around.

in October they don't stick around for like, they stick around maybe six, eight weeks and then they're gone. And I'm like, God, you know, I've had jobs like that. I'm still on my bike ride and I'm like, yeah, I've, and I just sort of like, it fell on me. Well, what made me bloom? And then that's when I started looking back at all that research and saying, well, there's gotta be factors.

Anyway, that's the, the legend of the story.

Carolyn: The legend. And well, and it just gives us permission to not have to be a hundred percent all the time. It's okay. Sometimes 20% is okay to be honest.

Dan: Exactly. Exactly. Yeah. And again, that's why I'm here. I'm like, how do I help leaders see that a, they don't have to be blooming all the time and be their team members will not be blooming all the time.

So how can we just represent that, first and foremost, and then secondly, maybe have conversations openly about. What that means. Yeah. In,

Carolyn: in a real way. And not, not have it be, a punitive thing. Exactly. Yeah. So, Dan, the book comes out. Can you remind us when the book comes out? 'cause this podcast is coming out before the book, so perhaps how lovely is that invitation to people to go make a, a pre-order?

Dan: Wow, that's so kind of you. the book is out in Canada, 24 October, and globally on the 7th of November.

Carolyn: All right, and they can get pre orders. Where can they get pre order?



Dan: If you, just head on over to worklifebloom.com, you will find all kinds of fun and free stuff, including, if you preorder, you get all kinds of stuff, but also there's a free, you can take the work life bloom assessment for free.

which is also available at that site, worklifebloom.com.

Carolyn: There's no dashes or underscores

Dan: or anything. Straight on work life bloom. Nice and simple. Nice and simple. I try,

Carolyn: and. People can find you if they want to bring you in to maybe do a keynote to do any consulting, where can they find

Dan: you?

kind of the same spot. It all goes all to, uh, Dan P headquarters, but yeah, worklifebloom.com. There's some, about me contact information, lots of, sizzle reels and all my talks are up there if you're interested in any of the, thank you so kind, Carolyn, any of the other things that I do.

Carolyn: All right, well, Sarah, there are a host of other books as well that, grace my bookshelf, and, yeah, for their books, I believe, right?

This is book number 5.

Dan: Yeah, it's definitely a masochism, but, I do love what I'm doing and, there's always an itch to scratch, Carolyn. I hear you.

Carolyn: I hear you. I didn't know I would come out with book number two and I did. So I've already got ideas about book number three.

Dan: Well, I can't wait to be that early reader or alpha tester on book three.

Can't wait.



Carolyn: All right. Well, Dan, for, all of my podcasts, I asked three questions to wrap things up. Are you game? Game. All right, well, I don't, if you said, no, I don't, I wouldn't know what to say anyway. So you answered that. So my 1st question, and these questions, by the way, are all based around my evolve leader model.

And the 1st, 1's around self awareness. So I'm interested in hearing. Something that you're comfortable sharing a moment and experience that gave you an incredible amount of self awareness and insight. And it might not have been the most, gentlest of experience and maybe it was a little bit hard, but it gave you a lot of insight about yourself.

Dan: Yeah, an adult student, named Kaelin in 1999 called me out on my, ridiculous attempt at humor and, I embarrassed him and... It was unintentional, but I didn't realize what I was doing at the time, and he called me out on it about an hour later in my office, and I broke down and said, Oh, my God, I'm so sorry.

Also, I'll never do that again. And so it was a humiliating moment, but also a teaching moment. Yeah,

Carolyn: sometimes those harder moments are the ones that not even sometimes often they teach us a lot. Okay. Second question. what is a practice or ritual that you personally use to keep you in a calmer state or to get you back to a calm state after maybe your nervous system has been amped

Dan: up a little bit.

Also, since 1999, I have not taken a meeting on Friday afternoons and refuse to have meetings on Friday afternoon. So I'm 24 years in. Zero meetings and that's my meditative and or get stuff finished and or think and or address some, uh, self care with long bike rides, half day.

Carolyn: And I think we should point out you've been working in large organizations, so you are.



Making that boundary really work. It's not like, oh, Dan's got his own business. He can make up

Dan: his own rules type thing. Since 1999. Exactly. Amazing.

Carolyn: That's amazing. What, what prompted you to do that in 1999? That was a while ago. The world was pretty different.

Dan: I'm a different cat. Like I honestly, when I go to Ikea, I go in the exit door to the Aziz first.

I don't go through the showroom. So I've always tried to look at things differently. And that was one of them. Like, well, why have meetings on Friday afternoons? That's dumb. Let's meet. So maybe that's the best answer.

Carolyn: last question. What is a song or genre of music that makes you feel connected to something bigger than yourself?

Dan: It'd be cliché for me to say a tragically hip song. Yeah. However, I'm going to say a tragically hip song and. The song is called great soul. it's a poem by Gord Downey. the late great lead singer of the hip it's on their last album that they did called man machine poem. Sort of a B side unheralded track and what Gord's getting at in the poem effectively is, how do you as an individual rise in the face of adversity, reminding yourself of your own great soul?

Carolyn: Wow. He was a brilliant, brilliant artist. No questions. I have to look at that. I couldn't agree more. Yeah. Well, Dan, it is always, always a pleasure. Thank you so much for coming on the show. And I really, really encourage all the listeners to highly consider purchasing your new book. I think, I think it's, I think it's your best one yet.

The other ones aren't good. I think you've wrapped things up really nicely and, and really positioned, a really difficult topic into something that's tangible and, relevant in this day and age.



Dan: Carolyn coming from you. That means such a lot. Thank you. You're a good friend, but you're a seriously awesome professional in this space that we're both in.

So thank you for that. Thank you for this invite. And, yeah. having a good natter about the lack of work life balance, employee engagement and best selves at work. I loved it. Thank you. And learning

Carolyn: new words. There's always new words that Dan brings into conversations. So thanks for listening to everybody.

And if you liked this episode, please subscribe and like it. On the platform that you're listening to. Thanks again, everybody.

So where do you think you sit in this work life bloom paradigm that Dan created? Are you budding? Blooming? Are you in renewal? Or are you stunted? You know, as I look at this quadrant right now, I'm looking at it on my screen, I can see myself in each of these quadrants and different stages of my life, but also different days of the week, even, and as we navigate through so much change in our work lives and our home lives, I hope that you can find some perspective in this model that Dan shares in his upcoming book.

It's really helping me normalize. But it's okay not to give a hundred and ten percent every day all day. Sometimes, in fact most times, it's okay not to be running on overdrive.