

SWOT & Order™

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This book was developed from podcast conversations transcribed using *podtobook.ai*. All content has been reviewed, verified, edited, and refined by the author prior to publication.

ISBN:

Published by

First Edition, 2025

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Marketing Automation & Small Business Efficiency by Shaun Whynacht

"Automate where you can so that you can shine where it counts. So many times we're up so late because there's things that we have to do. Like you have to get these things done and then we're tired in the morning. We just, we go to these meetings in the morning or we meet with clients and we're exhausted because we didn't have processes in place to automate as we go through."

In the bustling world of small business ownership, there's a universal truth that every entrepreneur faces: the overwhelming feeling of drowning in repetitive tasks while desperately trying to focus on what truly matters—growing their business and serving their clients. If your inbox resembles a Jackson Pollock painting, you've accidentally double-booked yourself across time zones, or you've found yourself replying to "urgent" emails from the last election cycle, you're not alone. You're simply experiencing the growing pains of a business that needs systems, not just software.

The solution isn't about replacing human connection with cold automation. Instead, it's about creating what I call "human-first automation"—a strategic approach that frees you to focus on relationships, creativity, and growth while technology handles the repetitive heavy lifting. This isn't about robots taking over your business; it's about creating space for you to be more human, more present, and more valuable to the people who matter most.

The Automation Awakening: From Overwhelm to Optimization

The journey into marketing automation often begins with a simple realization: there has to be a better way. For many business owners, this moment comes when they're working late into the night, managing spreadsheets, drowning in email inboxes, and feeling completely disorganized despite their best efforts.

My own automation journey started accidentally in 2011 when I was working from my basement, living off spreadsheets and feeling perpetually behind. After discovering a guide on business automation from a company then called Infusionsoft (now Keap), I reluctantly agreed to explore their system after multiple follow-ups from their sales representative. What happened next changed everything.

Through six weekly onboarding sessions, we automated a single sequence: a 10-day email series teaching people how to use Facebook more effectively in their personal lives. The sequence consisted of 10 videos on 10 specific topics delivered over 10 days through 10 emails, all triggered by one opt-in page. At the end of this helpful sequence, I asked one simple question: "Would you like to talk about how I could help you with your business now?"

The results were staggering. I doubled my business that first year, with a 75% response rate to that final email. People wanted to talk because I had demonstrated value consistently over time without asking for anything in return. This wasn't about tricking people into buying; it was about building trust through systematic helpfulness.

This experience taught me a fundamental truth: automation isn't about doing less—it's about doing what matters most, more effectively. When you automate the routine, you create space for the remarkable.

The Real Cost of Manual Madness

Before diving into solutions, it's crucial to understand the true cost of operating without proper automation systems. The statistics paint a sobering picture of modern business inefficiency:

The average lead response time across industries is 47 hours. This isn't just a minor inconvenience—it's a business killer. When 70% of buyers choose the first responder and customers expect replies within 10 minutes, not 47 hours, slow response times directly translate to lost revenue. If you've ever needed urgent help with a leaking appliance or roof repair, you know the first person who responds typically gets your business.

Small business owners spend 51% of their day on low-value or no-value tasks. These are the activities that keep you busy but don't move the revenue needle. Meanwhile, 19% of work hours are lost switching between disconnected tools—and that's before factoring in the time spent wrestling with two-factor authentication across multiple platforms.

Perhaps most damaging is the inconsistency problem. When some customers receive VIP treatment while others encounter silence, you're not just hurting

your business—you're damaging the relationships of people who refer others to you. When your best friend recommends your services and their referral receives poor service, both relationships suffer.

The fragmentation extends beyond customer experience. Without proper systems, opportunities go cold, leads fall through cracks, and manual processes prevent scaling. You end up wearing too many hats, becoming the bottleneck in your own business growth.

The Three Pillars of Business Task Classification

To implement effective automation, you must first understand what you're actually doing all day. Every business is essentially a collection of tasks and activities that, when performed by people or systems in a structured way, produce outcomes that contribute to your goals. Simply put: you have stuff to do, and it won't get done unless someone or something does it.

The key is categorizing these tasks into three distinct buckets:

Non-Revenue Generating Activities include bookkeeping, cleaning, paperwork, travel booking, and IT issues. These tasks are necessary but don't directly contribute to your bottom line. For these activities, ask yourself: Can this be delegated to someone whose time costs less than mine? Can it be automated through software? Or can it be eliminated entirely?

Potential Revenue Generating Activities encompass social media posting, content creation, blog writing, podcast editing, and nurture sequences. While you can't draw a direct line from these activities to specific revenue amounts, they have the potential to generate business over time. The goal here isn't elimination but optimization—using automated tools to become more efficient while maintaining your personal touch.

Revenue Generating Activities are your client consultations, direct client work, and events where you need to be present. If you're the face of your business, these activities require your personal involvement. This is where you shine, where your expertise and personality create the most value.

Once you've audited your tasks using this framework, you can delegate, automate, or eliminate each one. This isn't about being lazy—it's about being strategic with your most valuable resource: your time.

The Customer Experience North Star

Your customer experience should be your North Star when implementing automation. This isn't about efficiency for efficiency's sake; it's about making every touchpoint feel intentional and consistent. Think of it as the Disney dream—creating an experience so memorable that people can't help but talk about it.

Consider this real example: A financial advisor's office created an exceptional experience using their CRM system. When I visited for the first time, the receptionist asked what I'd like to drink. I requested coffee with two cream. Two weeks later, when I returned, she automatically offered "coffee with two cream, like you like it." This wasn't superhuman memory—it was systematic excellence. They had trained their staff to ask the question and record the preference in their CRM, so it appeared with every future appointment.

These small moves automate the customer experience journey without losing the human touch. In fact, they enhance it by ensuring consistency and showing clients that their preferences matter enough to remember and honor.

The statistics support this approach: 80% of people are more likely to buy when there's personalization involved, 82% expect fast responses, and 89% will switch after just one bad experience. In today's market, consumers have countless options, so exceptional, consistent experience becomes your primary differentiator.

The Before and After of Automation Implementation

The transformation that occurs when businesses implement proper automation systems is dramatic. Understanding these before-and-after scenarios helps illustrate the practical impact of systematic thinking.

Before automation, leads sent through website contact forms often sit in inboxes for days, buried in spam folders or lost in the chaos of daily operations. There's no immediate acknowledgment when someone fills out a

form—they're left wondering if their inquiry was received. Opportunities go cold because there's no system to track or nurture them, and competitors who respond first win the business.

After automation, instant auto-replies set proper expectations. If you can't respond within an hour because you're doing service work, that's fine—just tell people when they can expect to hear from you. Internal alerts trigger notifications via text or email when new inquiries arrive, allowing you to respond quickly even when you're away from your desk. Some business owners prefer phone calls over emails, so they receive text notifications with the prospect's phone number, enabling them to call back immediately.

This systematic approach increases connection rates by 10 to 100 times compared to delayed manual responses. When someone researches your business online and fills out a form rather than calling directly, quick automated responses keep the momentum alive while you prepare personalized follow-up.

The Art of Lead Nurturing and Customer Onboarding

Effective automation shines brightest in lead nurturing and customer onboarding sequences. These processes benefit from consistency, timing, and personalization—all areas where automation excels when properly implemented.

Traditional lead nurturing often consists of one generic email followed by silence. Modern automated sequences use strategic drip campaigns with storytelling, social proof, and timely follow-ups. This approach generates 451% more qualified leads and 18 times more revenue compared to manual methods.

The key is understanding that nurturing isn't about pushing for sales—it's about being helpful over time. Each email in your sequence should provide value, answer questions, or solve small problems. By the time you make any sales-related ask, you've already demonstrated your expertise and built trust.

Customer onboarding follows similar principles. Instead of manual emails, late follow-ups, and confused customers, automated welcome series provide clear

next steps, helpful tips, and proactive check-ins. The frequency can be programmed to match the customer journey: daily check-ins for the first week, then weekly, then bi-weekly as the relationship matures.

Research shows that 86% of customers stay loyal to businesses that educate and guide them through processes. This aligns with the StoryBrand framework principle: you are the guide, not the hero. Your customers are the heroes of their own stories, facing challenges and seeking guidance. Your role is to provide that guidance consistently and helpfully.

The Chuck Principle: Automation That Enhances Human Connection

The best automation doesn't replace human connection—it enhances it. This principle is embodied by Chuck, a banker who understood that relationships drive business success. Chuck manually called all his clients just to check in, not to sell them anything but to ask how they were doing and if he could help with anything.

When Chuck switched banks, his clients followed him—not because the previous bank was failing at basic banking services, but because Chuck had created relationships that transcended the institution. He met clients in person, remembered personal details, and consistently demonstrated that he cared about their success beyond their account balances.

Chuck's approach was so relationship-focused that his bank tried to discourage it, preferring he stay behind a screen and process transactions. Chuck pushed back, eventually leaving for an organization that valued his customer-centric approach.

The Chuck Principle teaches us that automation should free us to be more like Chuck, not less. When technology handles routine tasks, we have more time and energy for the personal touches that create lasting relationships. The goal is to automate the mechanical so we can focus on the magical.

The AI Integration Revolution

Artificial Intelligence represents the next evolution in business automation, but it requires thoughtful implementation to maintain the human-first approach. AI excels at handling routine inquiries, creating personalized

content, and managing complex decision trees, but it should complement, not replace, human judgment and creativity.

Modern automation platforms integrate AI capabilities that can analyze customer responses and generate personalized email content. For example, a wellness assessment can trigger AI-generated responses tailored to each person's specific answers, creating truly customized communication at scale. Each participant receives a unique response based on their individual assessment results, something that would be impossible to do manually with any meaningful volume.

AI voice agents can handle inbound calls, book appointments, and even manage objections when properly programmed. The key is transparency—don't try to hide the fact that customers are interacting with AI. People are becoming more comfortable with AI assistance when it's clearly identified and genuinely helpful.

Missed call text-back systems exemplify practical AI application. When you're in a client meeting and can't answer your phone, an automated text can immediately reach out asking how you can help. This keeps the conversation alive and prevents prospects from moving on to competitors while you're unavailable.

The technology exists to create sophisticated automated systems that feel personal and helpful. The challenge isn't technical capability—it's strategic implementation that maintains human warmth while leveraging technological efficiency.

Implementation Strategy: Starting Your Automation Journey

Beginning your automation journey doesn't require a complete business overhaul. Start with small wins that demonstrate value and build confidence in systematic thinking. The goal is progress, not perfection.

Begin by auditing your current processes using the three-bucket system: non-revenue generating, potential revenue generating, and revenue generating activities. Be honest about where your time actually goes, not where you think it should go. Track your activities for a week to get accurate data.

Next, identify your biggest pain points. What tasks do you dread? What processes consistently create bottlenecks? What activities keep you working late when you should be resting or spending time with family? These pain points are prime candidates for automation.

Start with simple email sequences. If people book consultations with you, create a welcome series that sets expectations, provides helpful information, and increases show-up rates. If you offer lead magnets, develop a follow-up sequence that delivers value while building trust.

Focus on customer experience improvements that don't require complex technology. Simple auto-responders that set proper expectations can dramatically improve customer satisfaction. Internal notification systems that alert you to new inquiries via text can speed up response times without requiring new skills or significant investment.

The Technology Landscape: Choosing Your Tools

The automation technology landscape offers numerous options, from simple email marketing platforms to comprehensive customer relationship management systems. The key is choosing tools that match your current needs while allowing room for growth.

Popular platforms include Keap (formerly Infusionsoft), HubSpot, ActiveCampaign, and newer options like GoHighLevel that offer comprehensive automation capabilities. Each platform has strengths and weaknesses, so consider factors like ease of use, integration capabilities, pricing structure, and support quality.

Don't get caught up in feature comparisons. The best platform is the one you'll actually use consistently. A simple system implemented well beats a complex system that overwhelms you. You can always upgrade as your needs evolve and your comfort with automation grows.

Consider starting with tools you already use. Most email platforms offer basic automation features. Your existing CRM might have capabilities you haven't explored. Phone systems often include auto-responders and call routing options that can improve customer experience immediately.

The goal isn't to become a technology expert—it's to leverage technology to become better at serving your customers and growing your business.

Measuring Success and Continuous Improvement

Automation success isn't measured by the sophistication of your systems—it's measured by business results and improved customer experience. Track metrics that matter: response times, conversion rates, customer satisfaction scores, and most importantly, your own stress levels and work-life balance.

Monitor email open rates, click-through rates, and response rates for your automated sequences. If people aren't engaging with your content, adjust your messaging, timing, or frequency. Automation allows for easy testing and optimization.

Pay attention to customer feedback. Are they mentioning improved communication? Faster responses? Better organization? These qualitative measures often matter more than quantitative metrics.

Track your own time savings. Are you spending less time on routine tasks? Do you have more energy for high-value activities? Can you take time off without your business suffering? These personal benefits often provide the strongest motivation to continue improving your systems.

Remember that automation is not a "set it and forget it" solution. Regular review and optimization ensure your systems continue serving your business goals as you grow and evolve.

The Future of Human-First Automation

The future belongs to businesses that can blend technological efficiency with human warmth. As AI and automation become more prevalent, the businesses that stand out will be those that use technology to enhance rather than replace human connection.

This means maintaining personal touches even within automated systems. Send holiday cards with handwritten notes. Make personal phone calls to check in with important clients. Remember personal details and preferences. Use automation to free up time for these relationship-building activities, not to eliminate them.

The goal is to automate where you can so you can shine where it counts. When technology handles routine tasks, you have more energy for creativity, problem-solving, and building the relationships that truly differentiate your business.

Your automation journey is ultimately about creating a business that serves you rather than enslaving you to it. It's about building systems that allow you to be present for your family, pursue your interests, and bring your best self to your work.

The question isn't whether you need automation in your business—it's how quickly you can implement systems that free you to focus on what matters most. Your customers, your family, and your future self will thank you for taking this step toward systematic excellence.

Start small, think systematically, and remember that every expert was once a beginner. The technology exists to transform your business operations. The only question is whether you'll take advantage of it or continue struggling with manual processes that limit your growth and drain your energy.

Your business deserves systems that support your success. Your customers deserve consistent, excellent experiences. And you deserve to work on your business, not just in it. The time for automation is now—not because it's trendy, but because it's the foundation for sustainable business growth in the modern marketplace.

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The Confidence Curve: Turning Setbacks into Strategic Wins by Leah Garcia

"It's never about how much money you make, folks. It's about how much money you keep and put into your pocket. Most people make some money to lose some money, make some money to lose some money. But we got to flip the script on that. We got to start playing money chess, not money checkers."

The little girl clutching a bottle of Windex, carefully cleaning the windows of a run-down house in East San Jose, had no idea she was practicing what would become her life's mission. At six years old, Leah Garcia believed the commercial's promise: "If you spray Windex on your windows, your whole world will sparkle." Twenty years later, as a financial strategist, she would discover that helping others "shine up their financial future" wasn't so different from that childhood ritual of making her world a little brighter.

Growing up on food stamps and welfare on the "wrong side of the tracks," Garcia would often venture into nicer neighborhoods with her family, gazing at homes with green grass and shiny cars. The question that burned in her young mind—"How do they live there? What did they do to have those things?"—would eventually drive her to spend two decades in the financial industry, helping entrepreneurs and business owners build not just wealth for today, but dynasties for tomorrow.

This isn't another story about getting rich quick or finding the perfect investment strategy. It's about understanding a fundamental truth that most people miss: wealth building isn't about how much money you make—it's about how much money you keep. And more importantly, it's about building that wealth in the right order, with the right foundation, so it can survive market crashes, health crises, and the inevitable challenges that life throws at even the most successful entrepreneurs.

The Foundation: Why Order of Operations Matters in Wealth Building

Most people remember learning about order of operations in algebra class—the mathematical principle that determines which calculations to perform first in a complex equation. The same principle applies to building wealth, yet

Garcia sees entrepreneurs and business owners violating this rule constantly, trying to put on the roof and windows before laying a proper foundation.

"I've seen it over and over again," Garcia explains. "People are trying to build wealth without having the basics in place. It might work for a while, and for some people, it works for a long time. But at some point, something will become a gotcha."

The first layer of this financial foundation—the one that must be rock solid—consists of three critical components: health insurance, life insurance, and disability protection. For entrepreneurs who don't have an HR department putting together benefits packages, this foundation becomes even more crucial.

When it comes to health insurance, Garcia emphasizes that most people focus on the wrong metrics. "Don't just assume because it's affordable, it's the right plan for you," she advises. Instead, ask three golden questions: What is your maximum out-of-pocket exposure if something catastrophic happens? If you need specialized care in a different area, state, or even country, do you have access to those doctors? And for entrepreneurs specifically, is the plan HSA-compatible?

"Health insurance is about two things: quality of care and protection of assets," Garcia states firmly. "It's not about your copay when you go to the doctor. It's not about a gym membership. It's about if something happens—catastrophic illness or accident—what is your maximum exposure?"

The life insurance component of this foundation needs a modern upgrade. If you have life insurance that only pays when you die, Garcia argues, it's time to step into 2025. Modern life insurance includes living benefits, providing access to money if you experience a terminal illness, critical illness like cancer or heart attack, chronic illness, or even critical injury. This isn't cash value—it's access to the actual death benefit while you're still alive.

"We've updated our cell phone 20, 30, 40 times in the last 10 years, but we're still using old, outdated life insurance," Garcia points out. "Now's the time to upgrade to the new products."

The Emergency Fund: Your Opportunity Account

The second layer of the wealth-building foundation is what most financial advisors call an emergency fund. Garcia prefers to reframe this as an "opportunity account"—a shift in mindset that transforms this savings from a defensive measure into an offensive wealth-building tool.

"What if an opportunity comes to you and you could buy or expand your business? Maybe you want to go to that conference. Maybe you want to hire employees," Garcia asks. "If you have that opportunity account, it allows you to move quickly because money likes speed."

This reframing is crucial for entrepreneurs who are naturally opportunity-focused. While traditional financial advice emphasizes having three to six months of expenses saved for emergencies, Garcia's approach recognizes that for business owners, the biggest risk isn't just covering expenses during a crisis—it's missing out on opportunities that could transform their business.

The key principle here is liquidity with purpose. This isn't money sitting idle in a low-yield savings account, but rather strategically positioned capital that can be deployed quickly when the right opportunity presents itself. Whether it's a chance to acquire a competitor, invest in new technology, or expand into a new market, having readily accessible capital can be the difference between seizing the moment and watching it pass by.

Retirement Planning: Beyond Traditional Thinking

The third layer involves retirement accounts, but Garcia's approach differs significantly from traditional financial advice. While most advisors focus on stocks, bonds, mutual funds, and tax deferral, Garcia pulls back the curtain on strategies that many wealth managers won't discuss.

"If you're a solopreneur or entrepreneur and you're just using a traditional retirement plan, maybe you've got a self-directed IRA, that's going to limit how much money you can put in there and how much money you can make," Garcia explains. "We're entrepreneurs. We need products that we can put money into and we can access."

The limitation of traditional retirement planning becomes apparent when you consider the entrepreneurial journey. Business owners often have irregular income streams, significant growth opportunities that require capital, and the potential for substantial windfalls that exceed traditional contribution limits. They need retirement strategies that can accommodate these realities while still providing tax advantages and long-term growth.

Garcia advocates for more sophisticated retirement planning strategies that can handle larger contributions, provide greater flexibility, and offer access to capital when needed. This might include defined benefit plans for business owners, cash balance plans, or other advanced strategies that traditional advisors often overlook.

The tax deferral question also deserves scrutiny. While many people focus on deferring taxes, Garcia challenges this conventional wisdom. "Tax deferred doesn't mean tax exempt. It just means tax later. I call that procrastination, and procrastination is almost never wise."

She points to clients with large 401(k)s and IRAs who reach retirement only to discover the impact of Required Minimum Distributions (RMDs). These mandatory withdrawals can push retirees into higher tax brackets, creating a tax burden they never anticipated. The solution involves more strategic tax planning throughout the wealth-building journey, not just at the end.

Debt Management: The Leverage Trap

The fourth layer addresses debt management, where Garcia encounters significant confusion among entrepreneurs. Many have been told to "leverage their debt," but Garcia provides important context for this advice.

"You're talking about probably people who are multi-millionaires and they can absolutely afford to leverage their debt," she explains. "However, most people don't have access to liquidity just because of their last name. Most people can't go into a bank and say, 'Here I am, I'm this person, now lend me money.'"

The reality is that debt—whether it's a mortgage, student loans, or business debt—represents an obligation that must be met regardless of your income

situation. For entrepreneurs whose income can be variable and unpredictable, carrying significant debt creates additional risk and reduces flexibility.

Garcia's position is clear: "If you want to retire correctly—which is not a boomerang retirement where you retire and come back—if you want to have a real retirement, you have to be debt free."

This doesn't mean avoiding all debt during the wealth-building phase, but it does mean having a clear strategy for eliminating debt before retirement. It also means being strategic about which debt to take on and ensuring that any debt serves a clear wealth-building purpose rather than simply enabling lifestyle inflation.

The Order of Operations Trap

One of the most common mistakes Garcia sees is families who skip the foundational layers to focus on what feels more rewarding: saving for their children's college education. While this intention is admirable, it violates the order of operations in a way that can be devastating.

"Many well-meaning families will forego the health insurance—'I'm healthy.' They'll skip life insurance—'I don't need it, I'm young.' Forget about the emergency fund—'I've got a credit card.' Retirement—'I'm only 30 years old, that's not till 40, 50 years from now.' And they don't even think about their debt. Instead, they put money towards their children's college."

The problem with this approach becomes apparent when crisis strikes. Garcia shares the story of her 19-year-old nephew who was in a devastating motorcycle accident, ejected from his boots and thrown 90 feet from the motorcycle. When catastrophic events like this occur, families who have only college savings find themselves forced to withdraw that money, paying taxes and penalties, to cover medical expenses and other crisis-related costs.

"If all you have is that college savings, now what happens to that college plan?" Garcia asks. "People have taken it out, pay the taxes, pay the penalties. This is why order of operations is so critical."

The lesson here isn't to avoid saving for children's education, but to ensure that the foundation is solid first. Once health insurance, life insurance,

disability protection, emergency funds, and retirement planning are in place, then college savings becomes a wise addition to the financial plan.

Advanced Strategies: Long-Term Care and Tax Planning

The upper layers of Garcia's wealth-building framework address more sophisticated planning needs that become crucial as wealth accumulates. Long-term care planning represents one of the most overlooked aspects of financial planning, particularly among Generation X and Baby Boomers.

"Every week I have somebody coming to me and saying, 'Does Medicare pay for long-term care?' No, it does not pay for long-term care. 'Well, how do I pay for it?' Well, guess what? If you don't have a plan, then you're going to have to start paying for it yourself."

The statistics are sobering: most people will need some form of long-term care during their lifetime, and the costs can quickly devastate even substantial savings. Without proper planning, families face impossible choices: deplete their life savings, burden their children with caregiving responsibilities, or accept whatever care they can afford.

Garcia reframes long-term care insurance not as "nursing home insurance" but as "stay out of the nursing home insurance." With proper coverage, families have options. They can afford quality in-home care, allowing the family to focus on creating beautiful memories rather than providing physical care.

"When you are sick and struggling, do you want the last memories of your family to be them having to care for you?" Garcia asks. "Or do you want to be able to create those beautiful memories and go to the beach and enjoy a beautiful sunset?"

Tax-advantaged planning represents another sophisticated layer that goes beyond traditional retirement accounts. This involves strategies like Health Savings Accounts (HSAs) for entrepreneurs, which Garcia identifies as one of the biggest blind spots she sees. HSAs offer triple tax advantages—deductible contributions, tax-free growth, and tax-free withdrawals for qualified medical expenses—making them powerful wealth-building tools for business owners who qualify.

The Cherry on Top: Speculation and Estate Planning

The final layers of Garcia's framework address speculation and estate protection. This is where real estate investments, Bitcoin, and other higher-risk, higher-reward investments belong. By placing these at the top of the framework, Garcia ensures that if these investments go sideways or experience market downturns, they don't devastate the underlying financial security.

"If all those things do well, then great, you've got additional money," Garcia explains. "But if they go sideways or there's a downturn in the real estate market, you're not decimated. You have things that are put in place so that you can ride the wave."

This approach allows entrepreneurs to take appropriate risks with their wealth while maintaining financial security. It's the difference between speculation and gambling—speculation occurs when you can afford to lose the money you're investing, gambling occurs when you can't.

The ultimate protection for all of this wealth comes through proper estate planning, specifically what Garcia calls "a current and properly funded living trust." She emphasizes both elements: current (updated within the last few years to reflect changes in law and family circumstances) and properly funded (assets actually transferred into the trust).

"I know you Baby Boomers, you did your trust 20 years ago when your kids were little. Those don't count anymore," Garcia states bluntly. "And if it's not funded, meaning that you put things into the trust, now all you have is a really nice, very eloquent stack of papers."

The Power of Realized Gains

One of Garcia's most powerful concepts is the distinction between paper wealth and realized gains. While traditional financial advisors often counsel clients to "stay the course" during market downturns, dismissing losses as "just paper losses," Garcia advocates for a more active approach to wealth management.

"Most people make some money to lose some money. They make some money to lose some money," she observes. "But what do we say? We say buy low, sell high. But how many of you are selling high? How many of you are realizing those gains and putting them in your pocket?"

This approach requires a fundamental shift from passive to active wealth management. Instead of hoping that markets will eventually recover, Garcia advocates for strategies that lock in gains when they occur and protect against significant losses. She calls this "the power of realized gains"—money that you can actually spend because you've captured the profit.

"Traditional advisors are going to say, 'It's just a paper loss. Don't worry about it. Stay the course,'" Garcia notes. "Listen, folks, if we keep doing the same thing we've been doing, that's called insanity. We've upgraded our cell phone. Now it's time for us to upgrade our wealth management."

This philosophy extends beyond investment management to overall financial strategy. It's about moving from what Garcia calls "money checkers" to "money chess"—thinking strategically about wealth building rather than simply reacting to market movements or following conventional wisdom.

Learning from Unlikely Wealth Builders

Some of Garcia's most powerful lessons come from clients who built substantial wealth despite modest incomes. She tells the story of Loopy and Mary, former field workers who married at ages 12 and 14 and spent their careers picking cantaloupes and watermelons. When Garcia met them in retirement, they owned several homes paid off in cash, had accumulated over half a million dollars in retirement accounts, and were completely debt-free.

The secret to their success was elegantly simple. Mary, who had barely a second-grade education, explained their strategy: "We were working so hard, getting up early, staying up late, breaking our backs to put food on the table. Every month we're paying everybody else—we're paying the mortgage, we're paying the utilities. I thought if we're going to work so hard to pay everybody else, then it doesn't make sense for me not to pay ourselves first."

They started by paying themselves first—just five percent of their income—and gradually increased from there. This principle of paying yourself first, while simple in concept, requires discipline and consistency that many higher-income earners struggle to maintain.

The lesson here isn't about the amount—it's about the intention and consistency. Garcia illustrates this with the power of starting small: she helped one client begin with just one dollar per week. Instead of dismissing this small amount, Garcia suggested the client exchange each dollar for a roll of pennies and search for copper pennies from 1982 and earlier, which have higher metal content and increased value.

"At the end of a year, you might have \$52. But what if you have several hundred dollars in the value of those coins?" Garcia asks. The strategy teaches an important lesson: wealth building often starts with changing your relationship with money, not with having large amounts to invest.

The Virtual Family Office: Coordinated Professional Advice

One of the most expensive mistakes entrepreneurs make isn't related to market timing or investment selection—it's receiving conflicting advice from their professional advisors. Garcia identifies this as often the largest expense business owners face.

"If you're an entrepreneur, business owner, and you're receiving conflicted advice from your advisors, that is your biggest expense," she states. "It's costing you time, costing you money."

The solution involves creating what Garcia calls a "virtual family office"—a coordinated team of professional advisors who work together rather than in isolation. This team includes four key pillars: a tax professional (either an Enrolled Agent or CPA), an estate planning attorney, a tax attorney, and an insurance professional.

The problem with most advisory relationships is that each professional operates in their own silo, providing advice based on their specific area of expertise without considering how it integrates with the client's overall

financial picture. This creates conflicting recommendations that leave entrepreneurs paralyzed by indecision.

"You've got your insurance agent telling you one thing, your tax planning telling you something else, and your wealth management team tells you something else," Garcia explains. "A confused mind does nothing. So we don't take action, or maybe we take a little bit of action. And what did I say earlier? Money likes speed."

In Garcia's virtual family office model, she serves as the orchestra conductor, coordinating advice from specialists and ensuring that all recommendations work together toward the client's goals. This approach provides "one voice, one conversation" instead of competing recommendations from various advisors.

The team includes both local professionals and a national network of specialists that clients typically couldn't access on their own. "These are best in class in their specialty that I can get you access to," Garcia explains. "Remember, it's about the collaborations. Collaborations can open doors that you don't even know exist."

Exit Strategy: Beginning with the End in Mind

For entrepreneurs, one of the most critical aspects of wealth building involves planning for the eventual exit from their business. Garcia emphasizes that this planning must begin early in the business development process, not as an afterthought when retirement approaches.

"We are business owners. We're entrepreneurs. We have to begin with the end in mind," Garcia states. "When you're creating this business, I understand you're going to work hard. You're going to get up early. You're going to stay up late. You're going to miss those birthday parties. But if we do all of that to simply open our doors and then close our doors, to me, we just bought ourselves a job."

The exit strategy question involves multiple considerations: Will you train someone to take over the business? Are you planning to franchise the operation? Do you have intellectual property or systems that can generate

passive income? What does the business look like when you're ready to exit gracefully and profitably?

For entrepreneurs with business partners, this planning becomes even more critical. Garcia issues a strong warning: "If you have started a business with a partnership, you must, must right now stop. Do not pass go. You need to create a legal agreement with that partnership."

This agreement must address not only how the business will operate, but how partners will exit the business. The stakes are high because successful businesses can grow rapidly from struggling startups to multi-million-dollar enterprises. Without proper legal agreements, partners may find themselves in devastating disputes just when their business becomes most valuable.

"We will go literally from zero to hero. You might be struggling today and one conversation opens up doors that you never anticipated," Garcia warns. "And now suddenly your business is worth multi-million dollars, and you and your business partner have not figured those things out."

The Dynasty Mindset: Generational Wealth Building

Garcia's ultimate vision extends beyond building wealth for retirement—it's about creating generational wealth that can benefit children's children. This "dynasty mindset" requires thinking beyond traditional financial planning to consider how wealth can be preserved and transferred across generations.

"They say a wise man sets up their families for their children's children. And that's wise women too," Garcia notes. "But we can actually do this. Again, it doesn't mean that you are making a multi-million dollar net worth right now."

The dynasty approach involves several key components: proper estate planning that minimizes taxes and ensures smooth wealth transfer; teaching financial literacy to the next generation, and creating business structures or investment strategies that can continue generating wealth beyond the founder's lifetime.

This long-term perspective changes how you think about current financial decisions. Instead of optimizing only for your own retirement, you consider how each choice affects the family's long-term wealth-building capacity. This

might influence decisions about business structure, investment strategies, insurance planning, and estate planning.

The dynasty mindset also recognizes that wealth building is about more than money—it's about creating systems, knowledge, and opportunities that can benefit multiple generations. This includes building businesses that can continue operating profitably, creating educational opportunities for family members, and establishing values and principles that support continued wealth building.

Implementation: Moving from Knowledge to Action

Understanding these wealth-building principles is only the beginning—implementation requires systematic action and ongoing coordination. Garcia's approach recognizes that entrepreneurs need strategies that accommodate their unique challenges: irregular income, significant growth opportunities, and the demands of running a business.

The implementation process begins with Garcia's "one-page financial plan"—a comprehensive assessment tool that helps entrepreneurs identify gaps in their current financial structure and prioritize areas for improvement. This assessment covers all layers of the wealth-building framework, from basic insurance protection to advanced tax strategies and estate planning.

"This is really a way for you to take a snapshot of where you are financially," Garcia explains. "Kind of look at yourself and do a little SWOT analysis. Am I on track? Are there things that are missing?"

The assessment helps identify whether you're following proper order of operations or trying to build wealth without a solid foundation. It reveals blind spots that could become expensive problems and highlights opportunities for improvement that most people overlook.

For entrepreneurs paying over \$30,000 annually in taxes, advanced tax planning becomes crucial. This threshold indicates sufficient income and complexity to benefit from sophisticated strategies that go beyond basic retirement account contributions and standard deductions.

Similarly, entrepreneurs in the "retirement red zone"—within five years of retirement or already retired—need specialized attention to avoid common mistakes that can derail decades of wealth building. This period requires careful coordination of tax planning, Social Security optimization, healthcare planning, and investment strategy adjustments.

The key to successful implementation is recognizing that wealth building is not a do-it-yourself project for most entrepreneurs. The complexity of tax law, insurance products, investment options, and estate planning requires professional expertise. However, it also requires the right kind of professional expertise—advisors who understand the entrepreneurial journey and can provide coordinated, comprehensive advice rather than product sales or generic recommendations.

Garcia's virtual family office model provides this comprehensive approach, ensuring that all aspects of wealth building work together toward the entrepreneur's goals. This coordinated approach saves time, reduces costs, and most importantly, ensures that nothing falls through the cracks that could derail the wealth-building process.

The ultimate goal is creating what Garcia calls "wealth today, dynasty tomorrow"—building financial security for yourself while establishing systems and structures that can benefit multiple generations. This requires thinking strategically, acting systematically, and working with professionals who understand both the opportunities and challenges of entrepreneurial wealth building.

As Garcia learned from that six-year-old girl with the Windex bottle, sometimes making your world sparkle requires the right tools, the right technique, and the persistence to keep working until you achieve the results you want. In wealth building, as in window cleaning, the key is having a clear vision of what you want to accomplish and the discipline to follow proven methods until you achieve your goals.

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Stop Collecting Cards, Start Collecting Clients by Jane Mitchell

"If you're going to do a trade show and you don't plan and you don't have a strategy, then you might as well just staple a dollar bill to a business card and hand it out because you're going to get the same results."

The convention center buzzes with activity as thousands of attendees stream past endless rows of booths. Sales representatives stand behind tables laden with branded pens, mugs, and tote bags, hoping to catch the attention of potential customers. Yet by the end of the day, most exhibitors will have spent thousands of dollars with little to show for it except empty product boxes and a stack of business cards from people who may never become customers.

This scenario plays out at trade shows across the country every day, but it doesn't have to be your reality. According to Jane Mitchell, CEO of Jungle Jane Promotions and a veteran of the promotional products industry for over three decades, the difference between trade show success and failure comes down to one critical element: strategy.

"The biggest thing with trade shows is that the first thing you have to do is start with a strategy," Mitchell explains. "If you don't plan your strategy, the strategy is your strength—it's your number one strength. And it's going to be your number one weakness if you don't plan it."

After 31 years of helping businesses navigate what she calls "the marketing jungle," Mitchell has developed a systematic approach to trade show success that transforms random encounters into qualified leads and, ultimately, closed deals. Her methodology challenges the conventional wisdom of simply showing up with branded giveaways and hoping for the best.

The Foundation: Strategic Planning Before the Show

Most companies approach trade shows with a "spray and pray" mentality—they show up with whatever promotional products seem appealing, hand them out to anyone who stops by their booth, and hope that something will stick. This approach, according to Mitchell, is fundamentally flawed from the start.

"You need to know your primary objective of the trade show," she emphasizes. "Who is the client you're trying to reach? What do you need from that client to close business?"

The strategic planning process begins months before the actual event with a comprehensive analysis of your goals, target audience, and conversion requirements. Mitchell works with clients to identify their specific pain points and objectives through detailed interviews that go far beyond surface-level desires.

"We identify your pain points before picking the product," Mitchell explains. "We really go through with you and have a full interview about what you want to do, what you're trying to accomplish. Are you trying to get new customers? Are you trying to get name recognition? Everybody has a different goal."

The most crucial question in this planning phase is deceptively simple: "Who is your customer and where are they when they need to do business with you?" This question forces companies to think beyond demographics and consider the behavioral patterns and decision-making processes of their ideal clients.

Consider the apartment complex manager who approached Mitchell before a campus trade show. Her challenge was clear: she was competing against larger companies with bigger budgets, and her property was located several miles off-campus, which many students might find undesirable. Through strategic planning, they identified that her conversion rate was remarkably high—50% of students who toured the facility would sign a lease. This insight became the foundation of her entire trade show strategy.

The planning phase also requires companies to confront uncomfortable truths about their follow-up capabilities. Mitchell has observed countless businesses collect hundreds or even thousands of business cards at trade shows, only to let them sit in a drawer because the volume is too overwhelming to manage effectively.

"I had a person that took half of my suggestions, and she did the traffic arrest introduction that you'll see, but she didn't qualify any of them. She was so excited that she walked away with 1,300 contacts, but she's not going to get

back with them," Mitchell recalls. This scenario illustrates why strategic planning must include realistic assessments of post-show capacity and systems.

Traffic Arrest: Creating Irresistible Booth Magnetism

Once the strategic foundation is established, the next phase focuses on what Mitchell calls "traffic arrest"—creating compelling reasons for your ideal prospects to stop at your booth and engage in meaningful conversation. This goes far beyond simply having attractive signage or eye-catching displays.

"You want something fun, you want something interactive," Mitchell explains. The key is developing activities that naturally facilitate conversation while allowing you to qualify prospects in real-time.

The apartment complex manager's solution exemplifies this principle perfectly. Knowing that college students enjoy interactive activities, Mitchell suggested a simple game using red Solo cups that participants had to knock down. While seemingly basic, this activity served multiple strategic purposes.

First, it created visible activity in the booth that attracted attention from passersby. Second, it required participants to spend several minutes engaged in the activity, providing ample time for natural conversation. Most importantly, it created a relaxed atmosphere where prospects would "let their guard down" and become more willing to share information about their needs and preferences.

"While they're playing their game, they forget that you're working and trying to sell them," Mitchell notes. "So then you can find out—you can ask some questions."

During the game, the apartment manager could casually ask students about their housing preferences. Those who expressed interest in downtown living were allowed to complete the game and move on with a small consolation prize. However, students who indicated interest in off-campus housing were offered an opportunity to "win an easier way" by signing up for a property tour.

This approach yielded remarkable results. Rather than collecting hundreds of unqualified contacts, the apartment manager left the show with just five genuine prospects—all of whom had expressed specific interest in off-campus housing and committed to visiting the property. Of those five qualified leads, two signed leases, representing a clear return on investment that could be directly attributed to the trade show.

Another client, who sold large water storage tanks to farmers, had experienced the opposite problem the previous year. He had been the "hit of the show" with popular twist-up frisbees that everyone wanted for their children or pets, but generated zero business because the giveaway attracted the wrong audience.

Working with Mitchell, he developed a water-themed ring toss game using water bottles. Participants who demonstrated genuine interest in water storage solutions by completing a detailed information form received a unique gift—a clock powered by water—that perfectly aligned with his business focus. This strategic shift transformed his trade show results from zero qualified leads to ten serious prospects.

The traffic arrest strategy succeeds because it engages prospects in activities that naturally reveal their level of genuine interest while creating positive associations with your brand. People who are simply hunting for free items will typically move on quickly when faced with interactive requirements, while genuine prospects will gladly participate in exchange for valuable information or solutions.

The Art of Qualification Through Conversation

The most critical skill in trade show success is the ability to quickly identify genuine prospects while engaged in seemingly casual conversation. This requires moving beyond small talk to uncover real business needs and decision-making authority.

"You use that moment to determine if they're a client or if they're just grabbing the freebies," Mitchell explains. "If they just want whatever you had out there for free to play the game, then you just let them do that and move on. You identify the fit—are they good for your services?"

Effective qualification begins with understanding what brought each person to your booth. Mitchell recommends starting with open-ended questions that reveal underlying motivations: "What brought you here today?" This simple question often provides immediate insight into whether someone is a serious prospect or simply browsing for entertainment.

The conversation should then progress to understanding their current challenges and future needs. For a real estate professional, this might involve discovering whether someone is actively looking to buy or sell property, or simply gathering information for potential future decisions. For a B2B service provider, it could mean understanding their current vendor relationships and satisfaction levels.

"What are their current challenges that they're trying to get through?" Mitchell asks. "If they're in your booth, you know that they most likely had some kind of an inkling. Most people, even for a game and for a freebie, will not spend their time if they don't think that it's worth it."

This observation highlights an important psychological principle: even people attracted by games or giveaways have made a conscious decision to invest their time in your booth. This suggests at least minimal interest in your category, which creates an opportunity for deeper exploration.

The qualification process should also explore alignment between your capabilities and their needs. Questions about the types of clients they serve, their business model, and their growth challenges help determine whether a meaningful business relationship is possible.

Throughout this process, the interactive element—whether it's a game, demonstration, or other engaging activity—serves as a natural conversation facilitator. People are more relaxed and open when they're engaged in enjoyable activities, making them more likely to share genuine information about their situations and needs.

The goal is not to conduct a formal sales presentation during the initial booth interaction, but rather to determine whether the prospect warrants inclusion in your post-show follow-up process. This qualification saves enormous time and energy in the weeks following the event.

Strategic Gifting: Beyond Branded Tchotchkes

The promotional products industry offers literally millions of options, from the ubiquitous branded pens and coffee mugs to sophisticated technology accessories and custom-designed specialty items. However, the sheer volume of choices often leads to poor decision-making based on price, personal preferences, or assumptions about what recipients might want.

Mitchell's approach to promotional product selection is methodical and strategic, considering multiple factors that most companies overlook. "People will say in promotional products that it's the product that is most important, but really the date and the planability is what's more important," she explains. "They want to make sure that they're able to execute with their plan and that the products show up on time."

The selection process begins with understanding the recipient's daily routine and environment. A smartphone stand that provides full-color branding space and accommodates charging cables might be perfect for office workers who spend significant time at desks, but less valuable for people who are constantly mobile.

The water tank salesman's clock powered by water exemplifies strategic product selection. Rather than choosing a generic item, Mitchell found a promotional product that directly related to his business focus while providing genuine utility to farmers and agricultural professionals who would appreciate the novelty and practicality.

Quality control is another crucial consideration that many companies underestimate. Mitchell personally tests products before recommending them to clients, understanding that a poor-quality promotional item can actually damage brand perception.

"If somebody gets a pen, you certainly don't want it to write bad because the last thing they see as they throw it in the trash is your company name," she notes. Her testing process includes having her husband, who is "super picky about pens," evaluate writing instruments. "If they make it off his desk then they're worth selling because he's super picky—he'll write for two seconds and throw it in the trash."

The gifting strategy must also consider practical logistics, particularly for trade shows where attendees may be traveling by air or have limited carrying capacity. Heavy, fragile, or bulky items create obstacles for recipients, potentially diminishing the positive impact of the gift.

One client who wanted to give away wooden cutting boards faced this exact challenge. Rather than forcing attendees to figure out how to transport large, heavy items, they collected contact information at the show and mailed the cutting boards afterward. This approach ensured recipients received high-quality, useful gifts without the logistical complications.

The most sophisticated promotional product strategies include tracking mechanisms that allow companies to measure the actual impact of their investments. This might involve unique phone numbers, QR codes that direct to specific landing pages, or special offer codes that can be traced back to the trade show distribution.

"If you can't track it, then don't place it," Mitchell advises. This tracking capability transforms promotional products from hopeful brand-building exercises into measurable marketing investments with clear return-on-investment calculations.

The Follow-Up Formula: Where Most Companies Fail

The period immediately following a trade show represents the most critical phase of the entire process, yet it's where the majority of companies fail to capitalize on their investments. Mitchell has observed that most businesses either delay their follow-up too long or attempt to contact too many unqualified prospects, leading to poor results and wasted effort.

"The number one thing you have to remember and keep track of is follow-up," Mitchell emphasizes. "If you can't follow up with your leads within two weeks, they're pretty much dead."

This timeline is not arbitrary—it reflects the reality of how quickly trade show experiences fade from attendees' memories. Within two weeks, prospects may struggle to remember specific conversations or commitments made during the

event. Beyond that timeframe, the likelihood of meaningful engagement drops dramatically.

The follow-up process should begin with strategic segmentation of contacts collected during the show. Rather than treating all contacts equally, successful exhibitors prioritize their outreach based on the qualification level achieved during booth interactions.

"Start out by only contacting the leads that were genuinely engaged," Mitchell recommends. This approach allows companies to focus their energy on prospects most likely to convert while avoiding the overwhelming task of contacting hundreds of marginally interested individuals.

Effective follow-up communications reference specific conversations and commitments made during the trade show. For Mitchell's clients, this often involves recalling discussions about upcoming events or specific business challenges mentioned during booth interactions.

"I find out when they're there if there's certain events they have coming up and what do they need products for for that event," she explains. "So then I might follow up with them and say, okay, you said you have a trade show coming up in two weeks or a month, and then we start the process of figuring out who their client is and what they're looking for."

The follow-up strategy should include multiple touchpoints over an extended period, recognizing that business decisions often involve lengthy consideration periods. However, this persistence must be balanced with respect for prospects' time and communication preferences.

Mitchell recommends building permission-based follow-up sequences that allow prospects to opt out gracefully. "Maybe in an email you say, 'We've reached out a few times and we're not getting a response, so this will be our last opportunity unless you reach out. I might put you in a tickler file, but I won't be sending you regular basis.'"

This approach demonstrates professionalism while keeping the door open for future engagement when prospects' situations or priorities change.

The most successful follow-up campaigns combine multiple communication channels—phone calls, emails, direct mail, and even social media connections—while maintaining consistent messaging and value propositions. Each touchpoint should provide additional value rather than simply repeating the same sales message.

Measuring Success: Beyond Vanity Metrics

Traditional trade show measurement often focuses on vanity metrics that provide little insight into actual business impact. Companies celebrate collecting thousands of business cards or generating high booth traffic without examining whether these activities translate into revenue growth.

Mitchell advocates for a more sophisticated measurement approach that tracks meaningful business outcomes rather than activity levels. This begins with establishing clear success criteria before the event and implementing systems to track progress against those objectives.

"You need to be able to track where your leads are coming from," she explains. "Track the qualified leads that you had, check the appointments that you've worked, and then how can you track the promotional product."

For the apartment complex manager, success was clearly defined: converting qualified prospects into property tours, with the understanding that 50% of tours typically resulted in signed leases. With this framework, her five qualified leads and two closed deals represented a measurable success that could be directly attributed to the trade show investment.

The water tank salesman's transformation from zero qualified leads to ten serious prospects provided another clear success metric, particularly when compared to the previous year's results with unfocused giveaways.

Tracking promotional product effectiveness requires implementing unique identifiers that allow companies to trace inquiries and sales back to specific trade show distributions. This might involve creating special landing pages accessible only through QR codes on promotional items, or using unique phone numbers that appear solely on trade show materials.

The measurement process should also include qualitative assessments of lead quality and conversion rates over time. A company that generates fewer total contacts but higher-quality prospects may achieve better long-term results than one that collects thousands of unqualified business cards.

Mitchell emphasizes the importance of conducting post-show analysis to inform future trade show strategies. "That's the only way that you're going to know what to do the next time," she notes. This analysis should examine both successful tactics and areas for improvement, creating a foundation for continuous refinement of trade show approaches.

The Competitive Advantage of Professional Guidance

The promotional products industry includes approximately two million different items, from basic writing instruments to sophisticated technology accessories and custom-designed specialty products. This overwhelming array of choices, combined with the complexity of strategic planning, qualification processes, and follow-up systems, creates significant challenges for companies attempting to navigate trade show success independently.

Mitchell's three-decade experience in the industry provides clients with access to tested strategies and proven products that might not be obvious to occasional trade show participants. Her systematic approach to understanding client needs, selecting appropriate promotional items, and implementing tracking systems represents a level of sophistication that most companies cannot develop internally.

"We do things a little differently," Mitchell explains. "We identify your pain points before picking the product. We focus on your ROI. We understand what works and what doesn't. I've been testing products for 31 years, and we tailor the solution to your audience."

This expertise extends beyond product selection to include comprehensive trade show strategy development, booth design consultation, and post-show follow-up system implementation. The goal is creating integrated marketing campaigns that leverage trade show investments for maximum business impact.

The quality control aspect of professional guidance cannot be overstated. Mitchell's rigorous product testing process ensures that promotional items reflect positively on client brands while providing genuine utility to recipients. This attention to detail prevents the brand damage that can result from poor-quality giveaways.

Professional guidance also provides access to industry relationships and supplier networks that enable more creative solutions and better pricing. The water-powered clock that perfectly aligned with the agricultural client's business focus exemplifies the type of unique product sourcing that comes from deep industry knowledge and extensive supplier relationships.

Perhaps most importantly, professional guidance provides accountability and systematic implementation of best practices. Many companies understand the importance of strategic planning and systematic follow-up but struggle to implement these practices consistently without external support.

The investment in professional guidance often pays for itself through improved conversion rates, better lead quality, and more efficient resource allocation. Rather than learning through expensive trial and error, companies can leverage proven methodologies that have been refined through thousands of client interactions and trade show campaigns.

Conclusion: Transforming Trade Show Investments into Revenue Growth

The difference between trade show success and failure rarely comes down to booth size, location, or promotional budget. Instead, it reflects the level of strategic thinking, systematic implementation, and professional execution that companies bring to their trade show investments.

Mitchell's methodology transforms trade shows from expensive networking events into systematic revenue generation activities. By focusing on strategic planning, targeted traffic arrest, meaningful qualification, appropriate gifting, and systematic follow-up, companies can achieve measurable returns on their trade show investments.

The apartment complex manager who converted two of five qualified leads into signed leases demonstrates the power of this approach. Rather than

collecting hundreds of unqualified contacts, she focused on attracting and engaging genuine prospects who were actively seeking off-campus housing solutions.

The agricultural equipment salesman's transformation from zero business results to ten qualified prospects illustrates how strategic product selection and targeted activities can dramatically improve trade show outcomes.

These success stories share common elements: clear strategic planning, engaging booth activities that facilitate natural qualification, promotional products that align with business objectives, and systematic follow-up processes that maintain momentum after the event.

The promotional products industry will continue to evolve, offering new technologies and creative solutions for trade show marketing. However, the fundamental principles of strategic thinking, audience understanding, and systematic execution will remain constant.

Companies that embrace these principles—whether through internal capability development or professional partnerships—will find that trade shows become valuable revenue generation tools rather than necessary expenses. The key is moving beyond the freebie mentality to embrace strategic thinking that transforms casual encounters into lasting business relationships.

As Mitchell observes, "The fortune is in the follow-up. Most competitors drop the ball here." Companies that master the complete trade show process, from strategic planning through systematic follow-up, will find themselves with a significant competitive advantage in their markets.

The choice is clear: continue spending money on random promotional products and hoping for the best, or invest in systematic approaches that transform trade show participation into measurable business growth. The companies that choose strategy over hope will find themselves navigating successfully through the marketing jungle while their competitors remain lost in the wilderness of unfocused activity.

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OOPS YOU DID IT AGAIN: A NO BS GUIDE TO REBUILDING YOUR BRAND

Julie Lokun

"You have the power to be your own spin doctor. When adversity looks us in the eye; wink, think and reframe the story."

In the unforgiving landscape of modern business, crises don't just knock on your door—they kick it down. Whether it's a viral scandal, internal betrayal, or a cultural shift that leaves your brand looking outdated, threats to your reputation can emerge from anywhere, at any time. But here's what most business leaders don't understand: every crisis contains within it the seeds of an extraordinary comeback.

The key lies not in avoiding threats—that's impossible—but in transforming them into powerful tools that can elevate your business to new heights. This transformation requires a fundamental shift in perspective, strategic thinking, and the courage to act swiftly when the stakes are highest.

The Four Pillars of Modern Business Threats

Understanding the landscape of potential threats is the first step in developing an effective defense strategy. Modern businesses face four primary categories of threats, each requiring a distinct approach and response strategy.

Reputational Threats: When Your Name Becomes News

Reputational threats are perhaps the most visible and immediately damaging to any organization. These threats can emerge from anywhere—a disgruntled employee's social media post, a customer's viral complaint, or in some cases, the personal conduct of leadership that spills into the public arena.

Consider the recent entertainment industry drama surrounding Blake Lively and Justin Baldoni during the promotion of "It Ends with Us." The situation devolved into a public battle of narratives, with sexual harassment allegations flying in both directions. Each side came out swinging with controlling narratives, moving fast and strong. But here's the crucial lesson: when both parties engage in a public mudslinging match, the audience often ends up believing neither side.

This illustrates a fundamental principle of crisis communication: the first narrative often becomes the lasting narrative. When you're facing a reputational threat, you must be transparent, respond quickly, and create your story before others create it for you. Speed and authenticity become your greatest allies.

Economic and Market Instability

While economic threats—such as tariff issues, market volatility, or supply chain disruptions—may seem beyond your control, they present unique opportunities for businesses that know how to navigate them effectively. The key is education and reframing. Rather than allowing external economic pressures to define your narrative, successful businesses educate their consumer base about the challenges while simultaneously repositioning themselves as the solution.

Societal and Cultural Shifts

The digital age has brought unprecedented challenges in the form of deepfake technology, propaganda, and rapidly shifting cultural expectations. These threats require businesses to stay agile and responsive to changing social dynamics while maintaining their core values and mission.

Internal Threats: The Enemy Within

Perhaps the most devastating category of threats comes from within your own organization. These are the situations where, as they say, "what hits the fan" comes from the people closest to you—the trusted employees, partners, or advisors who betray that trust.

Every successful entrepreneur has stories of internal betrayal: employees who steal money, partners who steal ideas, or team members who pretend to be friends while secretly working to steal clients. The challenge of internal threats is that they strike at the heart of what makes businesses function—trust.

The solution lies in understanding your values and surrounding yourself with people who share those same values. This sounds simple, but it requires rigorous vetting processes, open feedback systems, and maintaining authentic

communication channels even as your business grows and you become more insulated from day-to-day operations.

As businesses scale, leaders often become more distant from their teams, creating communication gaps that can foster toxic cultures or allow bad actors to operate undetected. The antidote is intentional, authentic communication from the C-suite and building a circle of trusted advisors who share your core values.

The Astronomer Scandal:

A Masterclass in Crisis Management

To understand how threats can be transformed into opportunities, let's examine one of 2025's most spectacular corporate scandals and the brilliant recovery strategy that followed.

Andy Byron, CEO of Astronomer, a rising tech company specializing in data workflow automation, was virtually unknown outside of tech circles. Kristin Cabot, the company's HR chief, was even less recognizable. Neither would have been household names under normal circumstances. But normal circumstances were about to go out the window.

During a Coldplay concert, the stadium's kiss cam landed on Byron and Cabot, capturing them in an intimate moment that immediately went viral. The problem? Both were married to other people, and their workplace relationship represented a massive breach of corporate ethics—especially damaging given Cabot's role as HR chief, the person theoretically responsible for preventing exactly this kind of situation.

The incident created multiple layers of threat for Astronomer:

- **Leadership credibility was destroyed**
- **Employee morale and trust were compromised**
- **The company's reputation was tarnished by association**
- **Potential legal and HR complications loomed**
- **The personal lives of families were devastated**

Within 24 hours, thanks to employees who recognized the pair at the concert, the kiss cam footage had exploded across social media platforms. Even Chris Martin, Coldplay's lead singer, called out the situation during the concert, recognizing something was amiss when he saw the couple's reaction.

The Initial Response: Swift and Decisive

Astronomer's first move was textbook crisis management. The company issued a public statement acknowledging that "its leaders are expected to set the standard both in conduct and accountability" and that "the standard was not met." They moved quickly to distance the company from Byron's behavior, making it clear that such conduct was unacceptable.

But what happened next elevated their response from competent to brilliant.

The Masterstroke: Gwyneth Paltrow's Intervention

Within days of the scandal breaking, Astronomer released a video featuring Gwyneth Paltrow—Chris Martin's ex-wife—speaking on behalf of the company. The connection was perfect: the scandal happened at a Coldplay concert, Chris Martin had called it out, and now his former wife was helping clean up the mess.

In the video, Paltrow delivered a masterfully crafted message that accomplished several objectives simultaneously:

"Hi, I'm Gwyneth Paltrow. I've been hired on a very temporary basis to speak on behalf of the 300 plus employees at Astronomer. Astronomer has gotten a lot of questions over the last few days, and they wanted me to answer the most common ones. Yes, Astronomer is the best place to run Apache Airflow, unifying the experience of running data, ML, and AI pipelines at scale. We've been thrilled so many people have a newfound interest in data workflow automation. As for the other questions we've received, yes, there is still room available at our Beyond Analytics event in September. We will now be returning to what we do best: delivering game-changing results for our customers."

This response was genius for several reasons:

Narrative Redirection: Instead of continuing to focus on the scandal, Paltrow smoothly pivoted to promoting Astronomer's actual business and upcoming conference.

Humor and Humanity: The cheeky tone and celebrity involvement showed that the company could laugh at itself while taking the situation seriously.

Speed and Relevance: The connection to Chris Martin made the response feel organic and timely rather than forced or desperate.

Brand Separation: By having an external spokesperson, Astronomer created distance between the company and the disgraced leadership.

Competitive Advantage: The viral nature of the scandal actually increased awareness of Astronomer's services among potential customers who had never heard of the company before.

The response demonstrated several key principles of effective crisis management: transparency, speed, creativity, and the ability to control the narrative even in the midst of chaos.

The Aftermath: Lessons in Personal and Corporate Recovery

The Astronomer scandal offers insights into both corporate recovery and personal brand rehabilitation. While the company managed to turn a potential

disaster into a marketing opportunity, the individuals involved faced a different reality.

Andy Byron and Kristin Cabot will likely never escape the association with the kiss cam incident. Twenty years from now, it will still come up in conversations about their careers. However, this doesn't mean their professional lives are over. Cabot, being less prominent, may find it easier to rebuild her career, though her credibility as an HR professional has been permanently damaged. Byron, as the CEO, faces a steeper climb back to executive leadership.

The incident also created an unexpected beneficiary: the young man sitting behind the couple in the stadium, whose bewildered reaction became part of the viral moment. He's now known as the "Kiss Cam Kid" and has turned this accidental fame into a personal brand opportunity, demonstrating how even bystanders can leverage unexpected exposure.

Internal Threats: The Greatest Danger to Your Business

While external scandals grab headlines, internal threats often pose the greatest long-term danger to businesses. These threats are particularly insidious because they come from within your circle of trust.

Identifying Toxic Culture Before It Destroys You

A poll of business leaders revealed a unanimous opinion: bad culture is a far greater threat to a brand than bad headlines. This makes intuitive sense—you can change the narrative around a headline relatively quickly, but transforming a toxic culture requires fundamental organizational change that can take years.

The signs of internal threats include:

- **Employees who don't share your core values**
- Lack of transparent communication between leadership and staff

- **Growing distance between executives and front-line employees**
- **Absence of feedback mechanisms**
- **Unclear ethical boundaries**

The Vetting Imperative

Whether you're a solopreneur working with freeLLancers or running a larger organization, vetting becomes critical. This goes beyond checking references and includes:

- **Assessing value alignment through behavioral interviews**
- **Creating clear ethical guidelines and communication expectations**
- **Establishing regular feedback loops**
- **Maintaining open dialogue even as your business scales**

As businesses grow, leaders naturally become more insulated from day-to-day operations. This distance, while sometimes necessary for strategic focus, can create blind spots where internal threats flourish. The solution is intentional systems that maintain authentic communication channels throughout the organization.

The Rebrand and Rebuild Toolkit

When crisis strikes—and it will—your response determines whether you emerge stronger or weaker. Every business will face some form of crisis, whether reputational, economic, societal, or internal. The goal is not to avoid crisis but to turn it into a comeback opportunity.

Step 1: Listen Before You Speak

Before crafting any response, you must assess what the public actually thinks about your situation. This means monitoring social media, conducting surveys, gathering feedback from customers and employees, and understanding the full scope of the threat. Don't assume you know how your crisis is being perceived—verify it.

Step 2: Understand Your Narrative

Be confident in your story, but be willing to evolve it based on circumstances. Conduct a thorough brand audit to understand how your current positioning aligns with public perception and market reality. Sometimes crisis forces necessary brand evolution that might not have happened otherwise.

Step 3: Redefine Around Growth and Values

Don't get stuck defending an outdated version of your brand. Instead, use the crisis as an opportunity to redefine your story around growth and core values. This might mean pivoting your business model, updating your messaging, or even changing your target market.

Step 4: Embrace Authenticity and Vulnerability

Modern audiences respond to authentic leadership, especially during crisis. Share your stories, admit your mistakes, and show vulnerability aligned with vision. People don't want to connect with perfect brands—they want to engage with human ones that learn and grow from their experiences.

Step 5: Control Your Narrative

Speed matters in crisis communication. The first narrative often becomes the lasting narrative, so you must move quickly to establish your version of events. Be transparent, respond swiftly, and create your story before others create it for you.

Step 6: Strategic Partnerships and Alliances*

Surround yourself with people and partners who elevate your brand. Every alliance should either take you upward or maintain your current trajectory—never accept partnerships that flatline or diminish your positioning. Choose allies who challenge you to do better, even if that feels uncomfortable.

The Power of Strategic Storytelling

In our hyperconnected world, every action is potentially public, and every mistake can go viral. A single social media like, an inappropriate comment, or even wearing the wrong logo can trigger a crisis. This reality might seem overwhelming, but it also presents unprecedented opportunities for those who understand how to navigate it.

The key is becoming your own spin doctor. You cannot always control what happens to you, but you can always control how you respond. This requires developing the ability to see yourself clearly—something that's often difficult when you're in the middle of a crisis. As the saying goes, "the pickle can't see the label when it's in the pickle jar."

This is where external perspective becomes invaluable. Whether it's trusted advisors, professional consultants, or peer networks, having people who can help you see your situation objectively is crucial for effective crisis management.

Building Resilience Through Community

The traditional model of public relations—sending out press releases and hoping for media coverage—is largely obsolete. Today's PR landscape requires active engagement, community building, and authentic relationship development. This shift actually benefits smaller businesses and entrepreneurs who can be more agile and authentic than large corporations.

Building resilience requires creating a community of supporters, customers, and partners who believe in your mission and will stand by you during difficult times. This community becomes your first line of defense against threats and your most powerful amplifier during recovery efforts.

The most successful businesses today are those that view crisis not as something to survive but as something to leverage. They understand that threats, when properly managed, can become the foundation for stronger brands, deeper customer relationships, and more resilient business models.

Every crisis contains within it the opportunity for reinvention. The question is not whether you'll face threats—you will. The question is whether you'll be ready to transform those threats into the building blocks of your greatest success.

Remember, there is always hope for recovery, always an opportunity to turn things around, and always a way to emerge stronger from crisis. The key is preparation, speed, authenticity, and the courage to see opportunity where others see only disaster.

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From Weakness to WOW: Turning Your AI SWOT into Strategy by Emelie Capshaw

"It's not just making it faster and cheaper, but it's redesigning how we do things. We're not replacing people, we're making them more effective by taking away the mundane tasks so they can do more empowering work, be more creative, and add more value to the organization."

In the span of just two years, artificial intelligence has evolved from a futuristic concept to an essential business tool that's reshaping entire industries. Yet despite this rapid evolution, a staggering reality persists: while 90% of businesses are exploring AI implementation, only 2% are successfully integrating it at the rate needed to serve their markets effectively.

Emily Capshaw, a seasoned CPA with 25 years of corporate experience as CFO and COO, found herself at the intersection of this transformation when she transitioned from corporate leadership to AI consulting. Her journey began when she joined a revolutionary AI platform called Loving AI—a chat system designed to operate at frequencies above 500, putting only positive content into the world, unlike traditional ChatGPT which operates at around 200 frequency levels.

"My friend Corey told me I needed to pair my business background with AI," Emily recalls. "That's when I discovered this amazing certification program and realized how I could help businesses implement AI properly." This realization launched her into a mission to help organizations demystify AI and harness its power for exponential growth.

The promise is compelling: properly integrated AI makes businesses more profitable, productive, and powerful. The keyword here is "properly integrated." Too many companies are throwing AI tools at problems without strategic implementation, often making things worse rather than better. The businesses that succeed aren't just adopting AI—they're transforming their entire approach to work.

The Current State of AI Implementation: Why Most Businesses Are Failing

An MIT report revealed a sobering truth: 95% of generative AI pilots at companies are failing. But here's the crucial insight—it's not the AI's fault. The failure lies in flawed integration and implementation strategies, not in the quality of the models themselves.

The businesses struggling with AI implementation face several common challenges. First, they're overwhelmed by choice. With over 40,000 AI tools available and growing daily—including 13,000 for specific tasks and 5,000 for entire job functions—decision paralysis is real. Second, many leaders lack understanding of what's possible with AI, limiting their vision to basic automation rather than transformative applications.

Fear plays a significant role in slow adoption. Companies worry about replacing human workers, systematic impacts on their operations, and reducing the human experience that differentiates their brand. There's also the misconception that AI implementation will be expensive and require massive effort.

However, the 5% of companies succeeding with AI implementation are seeing remarkable results. Harvard Business Review reports that these organizations are experiencing 40% increases in productivity, 20% revenue growth, 50% improvements in lead generation, and cutting product development time in half. The difference between success and failure lies in having proper strategy, roadmaps, and expert guidance for implementation.

"The solutions are actually very affordable—they're really cheap," Emily emphasizes. "The ROIs I've seen with companies implementing this properly are mind-blowing because for a little bit of investment, they're getting significantly more leads, reducing costs, and empowering employees to do more creative, valuable work."

Understanding AI Workflows: From Traditional to Agentic

To successfully implement AI, businesses must first understand how it transforms workflows. AI isn't just digitizing existing processes—it's fundamentally redesigning how work gets done. There are five distinct types of workflows that businesses can leverage:

Traditional Workflows remain unchanged, representing processes that don't benefit from AI integration. These might include highly personal customer interactions or creative strategy sessions that require human intuition.

Robotic Workflows involve simple automation—when someone books through Calendly, it automatically updates calendars and sends confirmation emails. These "if this, then that" processes have been around for years but form the foundation for more sophisticated AI applications.

Human-in-the-Loop with AI Tools represents where many businesses start their AI journey. A human uses ChatGPT to write a script, then moves to Video.AI for clips, then to CapCut for editing. The human orchestrates the sequence, moving between different AI tools to complete complex tasks.

AI Intelligent Workflows combine multiple AI tools into unified platforms like Zapier or N8N. These systems can push data from email platforms to CRM systems to marketing automation tools without human intervention, though they still follow predetermined rules rather than making decisions.

Agentic AI with Multi-Agent Systems represents the most advanced implementation. These systems can make small decisions autonomously and deploy actions across multiple steps. For example, an agentic system might analyze sales calls, identify what top performers do differently, create training materials based on those insights, and even generate video content using the best salesperson's voice and likeness to train others.

"We're seeing agentic software that can take over your whole computer," Emily explains. "You can tell it to take a spreadsheet you built and put it into a presentation for a board meeting, and it will access your drive, open your presentation software, and create the entire presentation autonomously."

Four Key Processes for AI Transformation

Successful AI implementation focuses on four core areas that can immediately transform business operations:

Conversational AI and Customer Interaction begins with the recognition that employees spend up to 80% of their time in conversations. Well-designed chatbots can handle the 90% of customer service questions that are repetitive

—returns, basic product information, scheduling—freeing human agents for complex issues requiring empathy and creative problem-solving.

The key is proper training and boundaries. "You can bring in all your prior conversations through emails and other channels, and the AI can learn how you've answered similar questions," Emily notes. "But you want to limit it to certain questions and have it say 'Let me connect you to a live agent' when it encounters something outside its training." This prevents situations like United Airlines' chatbot that gave away free tickets because it wasn't properly constrained.

Advanced conversational AI includes SMS chatbots, generative AI that simulates live conversations with startling realism, and social media response systems that can book calls directly into calendars. These systems can operate across multiple channels simultaneously, providing 24/7 customer engagement.

Data Management and Intelligence forms the backbone of effective AI implementation. AI tools can read invoices and automatically code them for accounting systems, analyze customer interaction patterns to predict behavior, and process vast amounts of unstructured data to reveal business insights.

"I'm helping a trucking company allocate costs to different projects automatically," Emily shares. "Instead of manually categorizing every expense, AI reads the invoices and routes costs to the appropriate project codes in their accounting system. This reveals whether they're charging enough for services and helps them understand true profitability."

Creative Asset Generation and Content Creation represents one of the most immediately impactful applications. AI can now create marketing videos, write newsletters, generate social media content across platforms with different tones, and even create clones of key personnel for training and marketing purposes.

The process Emily describes for a headhunting client illustrates this power: "We write her monthly newsletter using AI, then extract blog posts from that content, create social media posts with different tones for Facebook and

LinkedIn, and even automate job postings on Indeed. She reviews and approves everything, but the time savings are enormous."

Process Automation and Optimization extends beyond simple task automation to intelligent process redesign. AI can analyze workflows, identify bottlenecks, suggest improvements, and implement solutions across entire business operations.

The Twelve Areas of Business Transformation

AI implementation can transform virtually every aspect of business operations. Emily identifies twelve key areas where AI creates immediate impact:

Marketing and Lead Generation offers the quickest wins and clearest ROI. New platforms can automatically create and deploy ads across Facebook, LinkedIn, and other channels. Content creation becomes exponentially faster, with AI generating blog posts, social media content, email campaigns, and even video scripts tailored to different audiences and platforms.

Sales and Conversion optimization uses AI to analyze top performers and replicate their success. AI can review sales calls, identify successful techniques, create training materials, and even generate personalized scripts for different customer types. Some companies are using AI to create video training featuring their best salespeople, scaling their expertise across entire sales teams.

Customer Service and Admin Tasks benefit from AI's ability to provide personalized attention at scale. Chatbots handle routine inquiries, while AI analyzes customer sentiment and escalates issues appropriately. Administrative tasks like scheduling, data entry, and report generation become largely automated.

HR and Recruiting applications include resume analysis that goes beyond keyword matching to understand candidate fit, automated job posting across multiple platforms, and even preliminary candidate screening through conversational AI.

Asset and Product Development leverages AI for innovation and design. Companies are using AI to develop new products, optimize existing offerings, and even create medical devices that help paralyzed individuals regain movement.

Operations and Optimization uses AI to streamline workflows, predict maintenance needs, optimize supply chains, and improve resource allocation across organizations.

Finance and Accounting automation includes invoice processing, expense categorization, financial analysis, and predictive modeling for cash flow and budgeting.

Legal and Compliance support helps with contract analysis, legal research, and compliance monitoring. Emily shares how a client used ChatGPT to analyze a marketing contract and identify exit clauses, saving \$12,000 monthly on an underperforming service.

IT and Security applications include cybersecurity threat detection, system optimization, and automated security protocols.

Research and Development capabilities enable rapid market analysis, competitor research, and trend identification that would take human researchers weeks to complete.

Leadership and Culture Building uses AI to create customized training programs, analyze organizational communication patterns, and develop culture-specific improvement strategies.

Strategic Planning and Innovation leverages AI's analytical capabilities to identify market opportunities, optimize pricing strategies, and develop long-term strategic plans based on comprehensive data analysis.

The Eight Value Drivers: Your North Star for AI Implementation

Before implementing any AI solution, successful organizations identify their core value drivers—the fundamental elements that create competitive advantage and drive business success. Emily uses a proprietary framework that examines eight critical value drivers:

Strategy and Innovation focuses on how AI supports long-term strategic goals and drives innovation within the organization. Every AI implementation should align with and advance strategic objectives rather than simply automating existing inefficiencies.

Operational Efficiency examines how AI improves processes across marketing, sales, administration, and other core functions. The goal isn't just speed—it's optimization of entire workflows to eliminate waste and maximize productivity.

Revenue Impact measures whether AI implementations directly contribute to revenue growth through increased sales, improved conversion rates, or enhanced customer value.

Customer and Stakeholder Value ensures that AI improvements ultimately benefit customers, even when the technology operates behind the scenes. Better customer service, faster response times, and more personalized experiences all contribute to stakeholder value.

Brand and Creative Influence considers how AI enhances brand presence and creative output. This might include content creation, brand consistency across channels, or innovative customer experiences that differentiate the organization.

Data Intelligence and Analytics focuses on how AI improves decision-making through better data collection, analysis, and insight generation. Organizations that excel here use AI to understand customers, predict trends, and optimize operations based on data-driven insights.

Risk Management and Compliance addresses the critical need for responsible AI implementation that protects customer data, meets regulatory requirements, and maintains ethical standards.

People and Culture recognizes that successful AI implementation requires change management, employee education, and cultural adaptation. Organizations must help teams understand that AI enhances rather than replaces human capabilities.

"This is your North Star," Emily emphasizes. "If an AI implementation doesn't positively impact at least one of these value drivers, you're probably just creating more work for yourself. Every AI tool should make your company better in a measurable way."

Advanced AI: Understanding Agentic Systems

The most transformative AI implementations involve agentic systems—automated bots that can make multi-step decisions and deploy actions autonomously. Unlike simple chatbots or automation tools, agents can navigate complex scenarios, make contextual decisions, and complete entire workflows without human intervention.

Individual Agents handle specific tasks like research, content creation, or data analysis. ChatGPT's agent mode can book flights, finding the cheapest options for specified dates and actually completing the purchase. Research agents can analyze markets, identify pricing opportunities, and generate comprehensive reports on competitive landscapes.

Agent Workflows combine multiple agents to handle complex processes. A marketing workflow might involve a research agent analyzing target audiences, a content agent creating campaigns, and a deployment agent scheduling and launching across multiple platforms.

Agent Orchestrations coordinate multiple agents working on related tasks, ensuring outputs from one agent properly feed into another's processes while maintaining consistency and quality across the entire workflow.

Symphony of Agents represents the most advanced implementation, where multiple agents work together seamlessly, each contributing specialized capabilities to achieve complex business objectives. These systems can handle entire business processes from lead generation through customer onboarding and ongoing relationship management.

"Voice agents can now receive and make phone calls, not just with recorded messages but actually interacting with people in real-time," Emily explains. "When you consider that a voice agent costing \$200 monthly can replace five

hours of daily work while making more calls and maintaining consistent quality, the ROI becomes obvious."

The CPA's Perspective: AI in Finance and Accounting

Emily's background as a CPA provides unique insights into AI's transformative potential in financial operations. Traditional accounting involves enormous amounts of routine data processing—invoice coding, expense categorization, transaction matching, and report generation. AI excels at these tasks while providing analytical capabilities that enhance strategic decision-making.

"I'm helping my tax accountant implement systems that recognize client data and automatically feed it into tax preparation software," Emily shares. "Instead of manually entering information, the AI reads documents, extracts relevant data, and populates the appropriate fields."

Accounts payable automation represents a particularly powerful application. AI can read invoices, understand context, and automatically code expenses to appropriate categories—legal fees, outside services, equipment purchases. While human approval remains necessary, the time savings are substantial, allowing accounting staff to focus on analysis and strategic support rather than data entry.

For the trucking company Emily works with, AI allocation of costs to different projects provides insights previously impossible to obtain efficiently. "They didn't know how to get all their costs allocated to different projects. Now they can see if they're charging enough for services because they understand true project costs."

Financial analysis becomes exponentially more powerful when AI can process vast amounts of data to identify trends, predict cash flows, and suggest optimizations. "You have the ability to input financial data and get Ivy League-level analysis and recommendations," Emily notes. "It's like having Harvard MBAs analyzing your business 24/7."

Implementation Roadmap: Getting Started with AI

Successful AI implementation follows a structured approach that begins with education and strategic planning rather than tool deployment. Organizations

that jump directly to tools without proper foundation typically join the 95% failure rate.

Phase One: Education and Mindset Shift begins with leadership understanding AI's true capabilities and limitations. This isn't about replacing human workers—it's about augmenting human capabilities and eliminating mundane tasks that prevent employees from doing their best work.

"We've never seen anything like this in human history—technology that can actually do people's work," Emily observes. "That's hard for many people to digest. The fear that they'll become worthless or lose their jobs is real. Education must emphasize that we're making people better, helping them have more fun at work, and enabling them to do more valuable, creative work."

Phase Two: Value Driver Assessment involves honestly evaluating which of the eight value drivers most need improvement and would benefit most from AI implementation. This assessment guides tool selection and implementation priorities.

Phase Three: Process Mapping and Tool Selection identifies specific workflows that would benefit from AI enhancement. Rather than trying to automate everything, successful implementations start with processes that are repetitive, time-consuming, and clearly defined.

Phase Four: Pilot Implementation begins with small-scale testing of selected tools and processes. This allows organizations to learn, adjust, and build confidence before scaling implementations.

Phase Five: Scaling and Integration expands successful pilots across the organization while maintaining focus on value drivers and measurable outcomes.

Phase Six: Continuous Optimization treats AI implementation as an ongoing process rather than a one-time project. As AI capabilities evolve rapidly, organizations must continuously evaluate new tools and opportunities.

The Human Element: Change Management and Culture

Perhaps the most critical aspect of successful AI implementation involves managing the human side of transformation. Emily emphasizes that technology alone never drives successful change—people do.

"Some people really don't like change," she acknowledges. "You need to pay attention to different personality types and provide education that helps them understand how AI makes their work more interesting and valuable rather than threatening their job security."

Effective change management involves several key elements:

Transparent Communication about AI's role in the organization, what will change, and how employees will be supported through the transition.

Skills Development that helps employees learn to work effectively with AI tools, understanding both capabilities and limitations.

Role Evolution that clearly defines how jobs will change and what new opportunities emerge as AI handles routine tasks.

Success Metrics that demonstrate how AI implementation benefits both the organization and individual employees.

Ongoing Support through training, troubleshooting, and continuous improvement processes.

The most successful implementations frame AI as a tool that makes employees more powerful rather than one that makes them obsolete. "We're taking away the yucky work," Emily emphasizes. "People actually like their jobs more when they're not doing mundane tasks because they have time for the parts of their work they find engaging and valuable."

SWOT Analysis: Strengths, Weaknesses, Opportunities, and Threats

A comprehensive SWOT analysis reveals the current state of AI implementation across businesses:

Strengths include increased strategic visibility through better data analysis, enhanced media content creation capabilities, improved accuracy in trend predictions, better decision-making through access to advanced analytics,

significant time savings across operations, and unprecedented personalization capabilities at scale.

Weaknesses involve team resistance to change, scattered data that limits AI effectiveness, under-utilization of implemented tools, and lack of understanding about where AI applies to specific business challenges. Many organizations also struggle with inconsistent implementation strategies across departments.

Opportunities abound in customer service enhancement, workflow automation, employee empowerment through better tools, and competitive advantage through early adoption. Organizations that properly implement AI while competitors struggle gain significant market advantages.

Threats include upcoming government regulation that may limit certain AI applications, continued team resistance that prevents effective implementation, competitors who successfully implement AI first, and ongoing concerns about data privacy and security.

"If you don't implement AI, your business will probably become stagnant and irrelevant," Emily warns. "Your competition is looking at this, and if you're not, you're going to get passed up."

The Future of Work: Preparing for Exponential Change

The transformation AI brings to business isn't linear—it's exponential. Organizations that master AI implementation don't just improve incrementally; they achieve breakthrough performance that creates entirely new competitive advantages.

"Businesses can grow at shockingly fast rates with proper use of AI," Emily explains. "It's not just about doing things faster or cheaper—it's about redesigning how work gets done and what becomes possible."

The companies succeeding with AI share common characteristics: they start with clear strategic vision, invest in proper education and change management, focus on value drivers rather than technology for its own sake, and treat implementation as an ongoing process rather than a one-time project.

For business leaders, the choice is clear: learn to harness AI's power properly, or risk being left behind by competitors who do. The technology exists, the tools are affordable, and the potential returns are enormous. What's required is the commitment to do it right.

As Emily concludes, "The world is rapidly evolving, and AI is at the forefront of this transformation. It's reshaping how we work, how teams collaborate, and how companies innovate. Standing still is no longer an option. The time to act is now."

The businesses that thrive in the AI era won't be those with the most advanced technology—they'll be those that most effectively combine AI capabilities with human creativity, strategic thinking, and customer focus. The transformation from weakness to wow isn't just about adopting new tools; it's about reimagining what becomes possible when human potential is amplified by artificial intelligence.

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The Science of Strength: Aligning Mindset, Strategy & Well-Being by Dr. Karissa Thomas

"Strength isn't always pushing harder. Sometimes it's matching pace. It's compassion without transaction. It's connection without an agenda."

When most people hear the word "strength," they immediately think of force—pushing harder, doing more, staying up later, holding everything together no matter what the cost. This version of strength has become the default in our high-performance culture, where leaders are expected to be invincible and teams are pushed to their limits quarter after quarter. But here's the truth that countless burned-out executives and exhausted teams have discovered: this kind of strength doesn't last. It burns out, it isolates, and it often hides complete exhaustion behind a facade of peak performance.

Real strength—the kind that sustains individuals, teams, and organizations through genuine challenges—is something entirely different. It's quieter, more nuanced, and paradoxically more powerful. It's the ability to stay steady when the moment tilts, choosing clarity over control, and maintaining presence in motion. This is what I call the science of strength, and it's not about the science of power, but rather the science of presence.

In our rapidly changing world, where systems shift overnight and expectations rise constantly, there's something profoundly valuable about people who can hold composure without losing connection. That steadiness, that inner calibration, has become the real competitive advantage in business and life. It's built on what I call the Mosaic Way—a framework for living and leading that encompasses three critical dimensions: emotional integrity, cultural flexibility, and identity agility. The word "mosaic" captures the essence perfectly: staying whole even when life feels fragmented.

Why This Matters Now More Than Ever

We're living in an unprecedented era where performance is constant, but genuine presence has become rare. Teams across every industry are tired. Leaders are stretched beyond their capacity. Every quarter brings a new level of disruption, and every headline demands that we adapt faster than the last

time. The pressure to keep up with automation, artificial intelligence, and digital transformation has created a culture of perpetual catch-up.

Through my career journey—from leading corporate initiatives at Coca-Cola to teaching in international schools in the Middle East, and coaching leaders through crisis recovery around the world—I've dedicated myself to studying and teaching what I call "resilient presence." This is the ability to stay steady, human, and effective while everything around you is in motion.

What I've learned through years of research and real-world application is revolutionary: the next era of business isn't about who can outwork the competition. It's about who can out-regulate their stress, out-connect their teams, and out-recover from disruption. Recent research confirms this insight, showing that emotional intelligence—our ability to stay aware, regulate our emotions, and empathize with others—is positively correlated with job performance, satisfaction, and significantly lower burnout rates across thousands of workers in different industries.

This is why the science of strength matters so much right now. Calm has become a leadership advantage. Connection has evolved into a productivity tool. Emotional clarity drives every measurable outcome that follows. In a world obsessed with metrics and performance indicators, the most important metric might just be how well you can stay present under pressure.

The Question That Changes Everything

Here's the question that reveals everything about your current relationship with strength: When life speeds up, who do you become? Do you over-function, trying to control every variable and outcome? Do you retreat into isolation, hoping the storm will pass without requiring your engagement? Do you frantically try to fix everything and everyone around you? Or do you freeze, paralyzed by the overwhelming nature of the challenges you face?

Each of us has what I call a "pressure pattern"—a rhythm our nervous system defaults to when life feels unpredictable or threatening. This pattern tells us everything about what we've learned to call strength, usually shaped by early experiences, family dynamics, and professional environments that rewarded certain responses while discouraging others.

But true strength is actually revealed in how we perform when things fall apart, how we come back when they do, and how we stay emotionally available to the moment instead of being consumed by it. This kind of strength allows us to lead effectively, connect authentically, and think clearly even when the environment around us is noisy, uncertain, or chaotic.

This is the space we're exploring—not toughness in the traditional sense, not power over others, but resilient presence: the strength that keeps you steady, empathetic, and effective in motion. It's the difference between surviving challenges and actually growing through them.

The Lesson of Shared Rhythm

One of the most defining moments in my understanding of strength didn't happen in a boardroom or classroom. It happened on a wooded trail during a 5K run in college, and it taught me something no textbook ever could about the true nature of human strength.

I was exhausted, significantly behind my target pace, with lungs burning and legs heavy as concrete. I was climbing what felt like an endless hill, ready to stop and accept defeat. Then, seemingly out of nowhere, another runner appeared beside me. She didn't speak. She didn't offer advice or motivation. She didn't try to push me to run faster. She simply matched my stride.

For the rest of that hill—which suddenly became manageable—we ran together in complete silence, synchronized, shoulder to shoulder. When we finally crossed the finish line, we hugged, smiled, and went our separate ways. This was before social media, before easy ways to stay connected with strangers who impact our lives. I never saw her again, but that moment, that shared rhythm, has stayed with me for over twenty years.

That experience taught me something profound about the nature of strength: it isn't always about pushing harder. Sometimes it's about matching pace. It's compassion without transaction. It's connection without an agenda. That single act of presence from a complete stranger expanded my capacity—physically, emotionally, and mentally—without a single word being exchanged.

This is what human connection does when it's authentic: it amplifies our strength beyond what we can summon alone. It creates a field of shared resilience that makes previously impossible things suddenly achievable. That stranger's presence didn't make the hill smaller or my legs stronger, but it transformed my experience of the challenge entirely.

The Biology of Connection and Calm

I didn't have the language for it during my undergraduate days, but what happened on that trail was a perfect example of co-regulation—two nervous systems syncing under stress. Her calm became my compass; her steady rhythm helped stabilize mine. This isn't just a beautiful metaphor; it's exactly how we're wired as human beings.

Humans are social regulators by design. We influence each other's emotional and physiological states constantly, often without conscious awareness. This is why some people can walk into a crisis situation and immediately shift the emotional temperature of the entire room—not because they talk louder or take charge more aggressively, but because they can carry and transmit calm.

This is what emotionally intelligent leadership actually looks like in practice: regulating the room without trying to control it. Your energy becomes data that others unconsciously process and respond to. People will borrow whatever emotional state you bring to an interaction. If you bring calm and centeredness, they'll tend to stabilize. If you bring panic or anxiety, they'll mirror that energy. If you bring focus and clarity, they'll align with it.

The science of strength begins with this fundamental awareness: our nervous systems are contagious. This isn't a soft skill or nice-to-have quality—it's a biological reality that determines the effectiveness of every team, every meeting, and every relationship we're part of.

The Chemistry of Composure

Science now confirms what we've intuitively known all along: calm isn't passive, it's physiological. Calm is chemistry. Connection operates through specific neural circuitry. Clarity develops through deliberate practice, not wishful thinking.

When you feel genuinely seen and safe in a relationship or environment, your body releases oxytocin—often called the trust hormone. This chemical creates a cascade of positive effects: increased empathy, better communication, enhanced cooperation, and reduced stress. When you feel dismissed, threatened, or invisible, cortisol spikes, narrowing your focus and heightening defensiveness. This is why communication under pressure feels so much harder—because biologically, our bodies shift into protection mode, where connection becomes secondary to survival.

Real strength isn't about ignoring or suppressing stress responses. It's about expanding your awareness within stressful situations. It's being able to say, "I can feel the tension in this room, but I still choose my tone carefully." It's "I can feel the urgency of this deadline, but I can still choose curiosity over reactivity."

This isn't soft—it's sophisticated self-regulation. In leadership, this kind of regulation has become the new resilience. It's not about being unaffected by pressure; it's about remaining responsive rather than reactive under pressure. This is the chemistry of composure, and it's learnable, measurable, and incredibly valuable in any high-stakes environment.

The Three Dimensions of Sustainable Strength

Through my work with teams around the world, I've identified three distinct dimensions of strength that separate reactive leaders from truly grounded ones. These three elements work together to create what I call the Mosaic of Strength—a living framework for staying fully human in high-speed systems.

The first dimension is emotional integrity—the alignment between your values and your responses, especially under pressure. This means honesty without hostility, boundaries without bitterness, and compassion without collapse. You don't suppress your emotions or fake calm, but you create space between feeling and reacting so you can choose your response. Emotional integrity says, "My feelings are real and valid, but my response is still my choice." When you operate this way, you stop trying to control outcomes and start creating trust instead.

The second dimension is cultural flexibility—the ability to navigate differences without defensiveness. Every day we move through various forms of difference: generational perspectives, communication styles, cultural backgrounds, and competing expectations. Cultural flexibility doesn't mean losing yourself to please others or abandoning your values to fit in. It means holding your identity steady while stretching your understanding. It's being curious under tension and asking, "What does respect look like for you?" before assuming it looks the same for everyone else.

Flexibility isn't weakness—it's wisdom. Rigid people might look confident in the short term, but they break under sustained pressure. Flexible people bend, listen, and adapt without losing their core integrity. Safety, not authority, creates genuine followership. When people feel truly seen and understood, they don't have to fight for space or recognition. This is the power of cultural flexibility: it builds psychological safety that multiplies performance.

The third dimension is identity agility—knowing who you are even as your roles evolve and change. Maybe today you're leading a project, tomorrow you're learning a new skill, and sometimes you're doing both in the same hour. People with identity agility can shift gears without losing their grounding. They can move across industries, seasons of life, or major changes without unraveling because their confidence isn't built on position—it's built on purpose.

People who lack identity agility get stuck defending old versions of themselves. They say things like, "This is who I've always been," instead of asking, "Who am I becoming?" Identity agility doesn't dilute you—it develops you. It's how you stay grounded and growing simultaneously.

The Mosaic Framework in Action

When these three dimensions work together—emotional integrity, cultural flexibility, and identity agility—they create something far more powerful than the sum of their parts. This is the mosaic framework: a way to live and lead with wholeness rather than fragmentation.

Each dimension is both a mindset and a muscle. Like physical muscles, they require regular practice to stay strong and responsive. When practiced

together consistently, they become a rhythm of resilience—a way to stay grounded while everything around you moves and shifts.

Whether you're leading a team through organizational change, supporting a family member through illness, or navigating your own career transition, these same muscles of strength apply. The mosaic way isn't just a professional framework—it's a way of being that turns wholeness into a practical leadership strategy.

To make this even more practical, I use the acronym MOSAIC to represent six daily qualities: Mindful integrity, Openness across cultures, Self-awareness in action, Agility of identity, Integrity of connection, and Courageous belonging. These aren't abstract ideals—they're daily choices that determine whether we lead from fragmentation or from wholeness.

When Technology Meets Humanity

A few years ago, I consulted with a company that had just invested millions of dollars in a state-of-the-art automation line with sophisticated robotics. The software was flawless, the rollout was precisely on schedule, and the efficiency gains were exactly what the projections had promised. But the people were silent.

This wasn't active resistance to technology—it was something more subtle and more dangerous. The employees weren't resisting the automation; they were resisting invisibility. They felt left out of the process, undervalued in the transition, and uncertain about their future role in an increasingly automated workplace.

This pattern is everywhere today. As organizations rapidly roll out automation and integrate artificial intelligence across their workflows, performance isn't collapsing because of technology problems. It's collapsing because people don't feel seen, heard, or valued in the process. Change is accelerating at unprecedented speeds, but communication and human consideration aren't keeping pace.

What did we do? We slowed down. We stopped asking, "How do we implement faster?" and started asking, "How do people feel during this

process?" We invited genuine feedback, created space for voices that had been overlooked, and made the human experience as important as the technical specifications. Within weeks, engagement rose significantly, and productivity followed. The technology hadn't changed, but trust had been rebuilt.

This experience reinforced a critical principle: culture always determines the speed of sustainable change. Technology can automate tasks and processes, but only trust can align hearts and minds. In our rush toward digital transformation, we cannot afford to leave human development behind.

The Power of Authentic Belonging

Years later, while working overseas, I met a teacher who perfectly articulated something many professionals feel but rarely express. She told me, "I feel split into pieces. There's one version of me at work, another version at home, and yet another version with friends. I'm performing everywhere and belonging nowhere."

Her leader told her something simple that changed everything: "I don't want your perfect version. I want your real one." Those words restored her energy and authenticity. She started teaching as herself—using her natural accent, her sense of humor, her vulnerability, and her unique perspective. Her creativity came alive, and her students responded with unprecedented enthusiasm.

This experience revealed something crucial: belonging isn't sentimental—it's strategic. When people stop performing and start contributing authentically, everything changes. When they stop masking their true selves, they start innovating. Belonging isn't about comfort; it's about access—access to people's full energy, complete intelligence, and genuine presence.

Organizations that create authentic belonging don't just have happier employees; they have access to capabilities and creativity that performed versions of people simply cannot provide. This is why diversity, equity, and inclusion initiatives fail when they focus only on representation without creating genuine psychological safety for people to show up as themselves.

Strength in the Face of Uncertainty

The mosaic of strength becomes most relevant during times of genuine uncertainty and challenge. Think about the current moment: government shutdowns stretch on indefinitely, affecting millions of employees, contractors, and families caught in bureaucratic uncertainty. Across sectors, teams are doing their best to hold things together without knowing when paychecks will resume or projects will restart.

Research tells us that morale drops sharply during shutdowns, and the ripple effects on engagement and retention can last for months after normal operations resume. Studies from the University of Virginia's Darden School found that a single government shutdown can lower morale as much as a 10% pay cut. In workplaces already stretched thin, that emotional toll compounds quickly.

But there's another side to this story that's equally important. Studies across multiple industries show that resilience—the ability to recover and adapt after disruption—directly buffers burnout and predicts better long-term performance. In one large-scale meta-analysis, people with higher emotional intelligence and resilience reported lower exhaustion and stronger job satisfaction under stress.

The science confirms what many of us have lived: strength isn't resistance to difficulty—it's recovery and growth through difficulty. The more effectively we recover from setbacks, the stronger our future capacity becomes. Resilience doesn't mean bouncing back to what was; it means learning how to bounce forward into what's possible.

During tough periods—shutdowns, layoffs, major pivots, or extended uncertainty—the leaders who last are those who stay steady, empathetic, and connected when circumstances are unstable. This is the science of strength in real time: not theory, not perfection, but presence.

A Personal Test of Strength

A few years after that transformative 5K experience, I faced a different kind of test that challenged everything I thought I knew about composure and

strength. My mother was diagnosed with triple-negative breast cancer, and suddenly all my frameworks and theories were put to the ultimate test.

That first Christmas after her diagnosis, I wanted desperately to give her joy and show her that life could still hold warmth and beauty. I booked us a cabin in the Pocono Mountains, envisioning cozy fires and peaceful moments together. The reality was quite different: it was freezing, the food wasn't great, and with chemotherapy, she could barely taste anything anyway.

I remember watching her by the fireplace, wrapped in a blanket, smiling faintly as snow fell outside. In that moment, I realized that strength isn't always about making the right plan or creating the perfect experience. Sometimes it's about showing up fully when nothing goes according to plan.

That winter taught me that love itself can be a form of endurance—quiet, tender, and profoundly human. This is leadership in its most essential form: managing through constant change, uncertainty, and challenges while still providing presence, not just plans, to the people who depend on you.

The workplace version of this looks like a manager who listens before reacting, a team lead who brings calm when systems shift unexpectedly, or a colleague who stays kind when pressure rises. In a world filled with change, the rarest skill has become emotional steadiness. When leaders model this kind of strength, teams don't just survive disruption—they learn to trust each other through it.

The Science of Shared Strength

Remember that fundamental biological truth: when people feel genuinely seen and valued, oxytocin rises and cortisol drops. Collaboration increases naturally. When people feel unseen or dismissed, the opposite happens. Belonging is chemistry and biology, and when it's strong, performance follows.

Calm brains connect better with others and with creative solutions. Connected teams innovate faster and more effectively. Trust becomes a renewable resource that fuels every outcome that matters to your organization. This isn't soft science—it's hard data about how human systems actually function at their best.

The most successful organizations of the future will be those that understand this science and build it into their culture, processes, and leadership development. They'll recognize that in a world where technical skills become obsolete quickly, the ability to create psychological safety, maintain emotional regulation, and foster genuine connection becomes the ultimate competitive advantage.

Moving Forward: Shared Pace, Shared Presence, Shared Purpose

If you remember nothing else from this exploration of strength, remember this triad: shared pace, shared presence, and shared purpose. When you match pace with others—not to rescue them, but to remind them they're not alone—you create momentum that lasts far beyond any individual interaction.

This is how cultures heal from trauma and dysfunction. This is how teams stabilize during uncertainty. This is how communities transform challenges into opportunities. In business terms, this is how results multiply—not just through systems and processes, but through people who feel genuinely supported and connected.

Strategy may set the direction for an organization, but human development sustains the motion toward that vision. The real science of strength isn't about dominance or control—it's about alignment. It's how we move from performance pressure to human-centered progress, and it's the foundation of every truly resilient organization.

The Choice Before Us

Here's my closing challenge: Who will you run alongside? Who in your organization is climbing uphill right now, quietly carrying more than they show? You don't have to run their race for them. You don't have to fix their path or solve their problems. You just have to match their pace and remind them through your presence that they're not alone.

Keep people development at the center of every strategy you build. Technology will keep evolving at breakneck speed. Markets will keep shifting in unpredictable ways. But people remain the core engine of every future you're trying to create and lead.

The science of strength teaches us that our greatest power lies not in individual performance, but in our ability to create conditions where others can access their own strength. In a world that often feels fragmented and overwhelming, the leaders who will make the greatest difference are those who help others remember their wholeness.

This is the mosaic way: not perfect pieces, but integrated ones, allowing light to shine through leadership that serves something larger than itself. In the end, strength multiplies when it moves from self to system, and the most powerful thing you can do is help others discover their own capacity for resilient presence.

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Strategic Flow: Balancing Growth, Alignment, and Leadership Clarity by Jennifer McKenna

"Your EQ and your RQ will determine your IQ's fate. Today's world, nobody really cares if you're the smartest guy in the room. What they care about is, do you care about them?"

The corporate landscape has fundamentally shifted beneath our feet, leaving many seasoned leaders feeling like they're doing more work but achieving fewer results. The traditional command-and-control methods that once guaranteed promotions and bonuses are now the very behaviors that crumble cultures and tank engagement scores. After twenty-three years of coaching executives through organizational transformations, I've witnessed firsthand how the superpowers that made yesterday's leaders successful have become today's leadership kryptonite.

This isn't about leaders doing anything wrong—it's about recognizing that we're operating in a completely different environment from what we've been accustomed to for decades. The conditioning that served us well in the past is now working against us. The solution isn't to try controlling the amalgamation of generations and new workplace needs around us. Instead, it's about making a fundamental shift within ourselves, retraining our brains to move from a profitability mindset to a prosperity mindset.

The Stark Reality of Today's Workplace

The numbers tell a sobering story. According to Gallup, only 23% of the global workforce is engaged. To put this in perspective, most companies become concerned when engagement scores drop below 80%, and anything under 70% is considered alarming. A global engagement rate of 23% represents a crisis of unprecedented proportions.

This disengagement isn't happening in isolation. Future Forum research reveals that 80% of workers report experiencing burnout, costing organizations collectively \$322 billion per year according to the World Health Organization. These aren't just statistics—they represent millions of people showing up to work feeling disconnected, exhausted, and undervalued.

What makes this particularly challenging for leaders is that many are applying the same strategies that brought them success throughout their careers. They're working harder, implementing more controls, and directing strategy more intensively, yet seeing diminishing returns. The disconnect isn't in their effort or intelligence—it's in their approach.

The Conditioning That's Holding Us Back

To understand why traditional leadership methods are failing, we need to examine the conditioning that shaped today's senior leaders. For decades, leaders were rewarded for specific behaviors: cutting costs (often meaning reducing workforce), controlling environments to drive productivity, and directing strategy based on their individual contributor success. These behaviors earned promotions, bonuses, and recognition.

This conditioning runs deep because it was reinforced repeatedly through positive outcomes. Every time a leader successfully "cut the fat" or tightly controlled their team's activities, they received validation that these approaches worked. The brain, always seeking efficiency, automated these responses into unconscious patterns.

But today's workforce interprets these same behaviors completely differently. When employees sense that leadership is looking for ways to cut staff, it creates hostility, burnout, and cynicism. They don't feel safe or supported. When leaders try to control the environment, it generates disengagement and resentment because people don't feel free to contribute meaningfully. When leaders direct strategy without seeking input, it creates insecurity and frustration because employees question their own value and competence.

The tragedy is that most of these leadership failures stem from misperception, not malintent. In twenty-three years of consulting, I cannot name a single client engagement where cultural breakdown came down to someone's malicious intentions. It's always misperception leading to miscommunication, which breaks down trust and crumbles culture.

Understanding the Prosperity Mindset

The shift from profitability to prosperity mindset isn't about abandoning financial responsibility—it's about expanding our definition of success.

Profitability mindset focuses solely on bottom-line results, often viewing employees as cost centers to be managed and controlled. Prosperity mindset recognizes that sustainable profitability comes from the health of the entire organization, including the wellbeing of employees, customers, and the broader community.

This distinction becomes clear when we consider how each mindset approaches decision-making. A profitability-minded leader facing budget pressure might immediately look to reduce workforce as a cost-saving measure. A prosperity-minded leader facing the same pressure would consider the same action, but the motivation and implementation would be entirely different.

It's not what you do—it's why you do it that matters. If layoffs are necessary to sustain the business and ensure long-term viability, that's a strategic decision made with the organization's survival in mind. If layoffs are implemented simply as standard practice to boost quarterly numbers, that's a profitability mindset that will devastate morale and engagement among remaining employees.

The prosperity approach requires leaders to communicate the why behind difficult decisions, helping teams understand how these choices serve the greater good of the organization's mission and sustainability. This transparency and context creates buy-in rather than resentment.

The Three Pillars of Transformation

Moving from control to connection requires development in three critical areas: self-awareness, self-knowledge, and operational clarity. These pillars work together to create the foundation for prosperity-minded leadership.

Self-Awareness: Recognizing Our Unconscious Patterns

Self-awareness begins with honest reflection about our intentions and automatic responses. Many leaders operate on autopilot, reacting from conditioning rather than responding from conscious choice. This pillar requires asking difficult questions: What are my real intentions? How am I being perceived? What sabotaging beliefs are driving behaviors that may not align with what I'm trying to create?

One of the most powerful concepts to understand is that perception is reality—not universal truth, but individual reality. Each person's perception is filtered through their unique experiences and conditioning. What one person sees as decisive leadership, another might perceive as micromanagement. What feels like helpful guidance to a leader might feel like lack of trust to an employee.

The key is pausing before making judgments and questioning our reality. Just because we perceive something doesn't make it true. This applies both ways—how employees perceive leaders and how leaders perceive employees. Most communication breakdowns, trust issues, and workplace conflicts stem from unexamined perceptions rather than actual malicious intent.

Self-Knowledge: Developing Emotional and Relational Intelligence

While IQ (Intelligence Quotient) was the primary driver of career advancement in previous decades, today's workplace operates by different rules. Your EQ (Emotional Quotient) and RQ (Relational Quotient) will determine your IQ's fate. The smartest person in the room is no longer automatically the most valuable—people care more about whether you care about them.

The beautiful aspect of this shift is that while IQ is relatively fixed, EQ can be developed throughout our careers with mindful practice. Emotional intelligence helps us understand and manage our own emotions, recognizing what we're feeling and why, without immediately reacting to those feelings. It's the difference between being enslaved to our emotional responses and consciously choosing our actions.

Relational intelligence takes this further, helping us connect more meaningfully with others. It's about applying emotional awareness in our relationships, understanding how our emotions and behaviors impact others, and creating genuine connections that transcend superficial workplace interactions.

This shift reflects a fundamental change in what employees value. Deloitte research shows that 65% of workers are willing to take a pay cut to work for a company with strong purpose. They're not seeking accommodation or special

treatment—they're seeking meaning, connection, and the sense that their work contributes to something larger than quarterly profits.

Operational Clarity: Aligning Systems with Values

The third pillar involves examining whether our organizational systems and operations actually support the culture and behaviors we want to create. Many companies inadvertently set themselves up for failure by misaligning different aspects of their business.

For example, if sales teams are incentivized to bring in as much business as possible, but operations teams don't have the capacity to fulfill those orders without creating severe burnout, the organization is operationally misaligned. If leadership preaches work-life balance but promotes only those who work excessive hours, there's a disconnect between stated values and operational reality.

Operational clarity requires looking at the organization as an integrated system where leadership development aligns with staff development, where business development supports organizational development, and where all parts work in harmony rather than competition. Like a propeller that needs balanced blades to achieve lift, organizations need aligned operations to truly take off.

The Neuroscience of Change

Understanding how the brain works helps explain why leadership transformation is challenging and why it requires patience and persistence. The brain operates on a cycle: beliefs drive thoughts, thoughts drive decisions, decisions drive actions, and actions create experiences that validate our original beliefs. This creates either a vicious cycle that keeps us trapped in old patterns or a virtuous cycle that generates positive change.

The comfort zone, managed by our ego, acts like a governor on a race car engine—it limits our speed and keeps us on a predetermined route. Even when that route is uncomfortable or counterproductive, the ego prefers the predictable over the unknown. This is why leaders often continue using strategies that aren't working; the brain prioritizes familiar patterns over uncertain outcomes.

Breaking this cycle requires conscious choice about what we input into our belief system. Instead of "seeing is believing"—waiting for others to change before we modify our approach—prosperity mindset operates on "believing is seeing." We consciously choose new beliefs and behaviors, then create experiences that validate these new patterns.

This process takes time and repetition. Leaders need significant information input at the awareness level before developing intrinsic motivation to learn more and take positive action. It's not a quick fix but a methodical practice of retraining neural pathways.

The Power of True Leadership

True power in today's workplace isn't about dominance or control—it's about creating conditions where others can thrive. This requires moving from directing strategy to empowering creativity with accountability. Instead of telling people how to do their jobs based on how we succeeded in the past, we create vision that people want to follow and environments where they feel free to contribute their best thinking.

This shift is particularly challenging for leaders who advanced through individual contributor roles. Their success came from personal expertise and execution. Now they must succeed through others, which requires entirely different skills. The transition from "I know how to do this" to "I trust you to figure out how to do this" represents a fundamental identity shift for many leaders.

The payoff for making this transition is significant. Stanford research, published in the Wall Street Journal, shows that employees value workplace flexibility equivalent to an 8% raise, and 92% of the workforce wants this flexibility. The old approach of "throwing money at problems" doesn't address what today's employees actually value most.

Practical Steps for Transformation

Moving from control to connection requires specific, actionable steps. First, leaders must identify their sabotaging beliefs—the unconscious assumptions that drive counterproductive behaviors. For example, the belief that

"employee loyalty is dead while mine is killing me" creates a victim mentality that justifies overwork and blame.

The second step involves using emotional and relational intelligence to make internal shifts. Instead of trying to fix others, focus on creating conditions for trust. This brings accountability back to the leader's sphere of influence and emphasizes the soft skills that truly drive organizational success.

The final step is operational clarity—identifying specific opportunities to create trust-building mechanisms within the organization. This might mean establishing formal processes for gathering employee input, creating innovation channels, or restructuring meetings to encourage collaboration rather than top-down communication.

The Ripple Effect of Change

When leaders make this internal shift, the external culture shifts automatically. High employee engagement and enviable culture become byproducts of focused intentions and conscious leadership rather than programs or initiatives imposed from above. This is why so many culture-building efforts fail—they focus on external changes without addressing the internal transformation required of leadership.

The soft skills often dismissed as "soft" are actually the backbone of every organization. Like the human spine, every system connects to this backbone. When we weaken it through neglect or dismissal, organizational systems begin shutting down until the whole structure collapses.

This isn't passive work—it's strategic and requires courage. True power manifests as the ability to remain calm, steady, and stable during storms, serving as the eye of the hurricane rather than getting swept up in chaos. This quiet strength (quiet doesn't mean soft; quiet means strong) generates respect, loyalty, and engagement that defies industry statistics.

The Collective Opportunity

We stand at a unique moment in business history. The old ways of leading are clearly not working, creating space for a new approach to emerge. Rather than

viewing this as a threat to established leadership, we can see it as our greatest opportunity for positive change.

The strength lies in our intention, mindset, and emotional intelligence. Our only weakness would be turning a blind eye to this power or succumbing to collective apathy and fatigue. The current challenges in our world—from workplace disengagement to broader social issues—call for leaders who can rise above reactive patterns and create positive change through conscious choice.

This transformation requires what I call a "Red Rover" approach—banding together to create cultures of trust so strong that nothing can penetrate them. When leaders collectively commit to this prosperity mindset, they create a movement that transcends individual organizations and industries.

Moving Forward with Courage

The path from control to connection isn't always comfortable, but it's necessary for effective leadership in today's world. It requires acknowledging that our past success strategies may not serve us going forward, and being willing to develop new capabilities that honor both profitability and people.

This journey demands courage—not the absence of fear, but the willingness to move through fear toward something better. When we feel fear arising, instead of trying to replace it with gratitude or positive thinking, we must look it directly in the eye. Often, we discover that our fears are attached to memories rather than present realities, and that conscious examination reduces their power over our decisions.

The internal shift begins with each individual leader, but its impact extends far beyond any single person or organization. When we commit to retraining our brains, developing our emotional intelligence, and creating operationally aligned systems, we contribute to a broader transformation in how business operates in the world.

The future belongs to leaders who understand that their primary job isn't to have all the answers or control all outcomes. Instead, it's to create conditions where trust can flourish, where people feel valued and heard, and where the

organization's purpose aligns with individual purpose. This is the essence of moving from control to connection—and it's the key to thriving in our rapidly evolving business landscape.

The choice is ours: we can continue trying to force old methods to work in new circumstances, or we can embrace the opportunity to become the kind of leaders our organizations and our world truly need. The data is clear, the path is available, and the time is now. We've got this.

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Unlocking Team Potential: The SWOT Behind Sustainable Success by Beth Ellis

"It doesn't matter if you hire the best talent in the world. You can have the best sales team, the best marketing team, the best operations teams. But if they haven't figured out that handoff, they're going to be DQ'd all the time. You'll never get to finish the race before it ever finishes."

The gun fires, and four of the world's fastest runners explode from their starting positions. The U.S. 4x100 relay team at the 2024 Paris Olympics was stacked with talent—three of the four athletes had already claimed Olympic medals in previous events. They possessed everything needed for victory: a starter known for smooth curves, a powerhouse for the straightaways, and a sprinter renowned for pure speed. On paper, they were unbeatable. They had even set a world record in qualifying times.

Yet as the baton made its way around the track, everything they had trained for fell apart in a matter of seconds. The handoff was awkward, taking so long that they moved outside the exchange zone and were disqualified. It was another heartbreak for Team USA, marking their fifth consecutive Olympic failure in this event—2008, 2012, 2016, 2020, and now 2024. Most of these failures weren't due to lack of speed or athletic ability; they were disqualified because of botched baton handoffs.

All their training, all their world-class talent, lost in a second because the handoff didn't work. The coaches had assembled the best team in the world, but it came down to precision, not speed. And precision was exactly what the U.S. team lacked.

This Olympic failure serves as a perfect metaphor for what happens in go-to-market teams across businesses every day. It doesn't matter if you hire the best sales talent, the most creative marketing minds, or the most efficient operations teams. If they haven't mastered the handoffs between departments, they'll be disqualified from the revenue race before it ever finishes.

The Entrepreneur's Blind Spot: When Success Masks Systemic Problems

I sit in offices with CEOs regularly, brought in because their sales have plateaued or declined. Often, these are entrepreneurs or leaders of early-stage startups who experienced initial momentum but now find themselves wondering what went wrong. Why aren't they closing deals? What's causing them to miss their numbers? The confusion is genuine and the frustration palpable.

The truth is that early-stage success often masks fundamental problems in go-to-market execution. In the beginning, entrepreneurs and small businesses benefit from warm introductions—contacts from their personal networks, their sales team's connections, or their VC's rolodex. These warm intros are incredibly valuable because they help refine the product and come with built-in obligation to engage seriously with the offering.

However, this early success creates a dangerous illusion. These initial customers weren't necessarily buying because they had a burning problem that needed solving and discovered the perfect solution through market research. Many purchased because of the relationship and trust established through the warm introduction. When that well of warm contacts runs dry, companies suddenly find themselves struggling to replicate their early success with cold prospects.

When I ask these struggling leaders to show me their numbers and identify where in their sales cycle they're losing prospects, 99% of the time I'm met with blank stares. They don't know because they're not tracking it. Nobody showed them how, or they're so focused on building their product that they haven't thought through these operational necessities.

This isn't a reflection of their intelligence or business acumen. Most entrepreneurs and small business owners are experts in their market, their product concept, and the technical aspects of what they're building. But expertise in one area doesn't automatically translate to expertise in sales, marketing, operations, or the dozens of other disciplines required to run a successful business.

I learned this lesson firsthand as the second hire at a startup, where I had to practically beg the CEO to implement a Customer Relationship Management

(CRM) system. He was a genius—truly brilliant—but he simply didn't know that tracking customer interactions and sales pipeline data was something he needed to do. This scenario plays out constantly in the entrepreneurial world.

Understanding the Customer Buying Cycle: The Foundation of Precision

To create precision in go-to-market execution, we must first understand the difference between how customers buy and how companies sell. This distinction is crucial, yet most entrepreneurs and startups never consider it.

The customer buying cycle represents the process that prospects go through to make a purchase decision. While every industry and product category has nuances, the basic framework remains consistent:

Research Phase: Customers identify that they have a problem or opportunity and begin researching potential solutions. This mirrors how we approach major personal purchases—when buying a car, we don't immediately walk onto a lot and purchase the first vehicle we see.

Option Identification: After understanding the landscape, customers narrow their focus to a manageable number of potential solutions, typically two to three options that seem most promising.

Evaluation: With their shortlist established, customers dive deeper into each option, comparing features, benefits, costs, and fit for their specific situation.

Decision: Armed with their evaluation data, customers make their choice and move toward purchase.

Purchase and Implementation: The final steps involve negotiating terms, completing the transaction, and beginning to use the solution.

Understanding this buying cycle allows companies to align their selling process accordingly. The selling journey should map directly to how buyers want to buy, but it requires different actions and content at each stage:

Attract: Create awareness and draw prospects into your ecosystem during their research phase.

Engage: Facilitate meaningful first interactions that demonstrate understanding of their challenges.

Qualify: Determine whether your solution truly fits their needs and whether they fit your ideal customer profile.

Demonstrate: Provide proof that your solution will solve their specific problems.

Propose: Present pricing and terms that make sense for their situation.

Close: Navigate procurement processes and finalize the agreement.

Onboard: Ensure successful implementation and early value realization.

The content and approach required for each stage differs dramatically. Research-phase content should be educational and problem-focused, while demonstration-phase content should be solution-specific and results-oriented. When companies fail to align their selling process with their customers' buying journey, they create friction that slows deals and reduces conversion rates.

The Data-Driven Solution: Tracking Your Sales Handoffs

Once you understand your customer buying cycle and align your selling process accordingly, you can begin tracking where prospects move forward and where they drop out. This visibility transforms vague concerns about "not closing enough deals" into specific, actionable intelligence.

By establishing clear stages in your sales process and tracking movement between them, you can identify exactly where your baton drops are occurring. For example, you might discover that 60% of your prospects are dropping out at stage three—somewhere in the qualifying phase. Armed with this knowledge, you can investigate whether you lack the right content for that stage, whether your qualification process is flawed, or whether you're attracting prospects who aren't truly qualified.

This precision eliminates the guesswork and finger-pointing that plague many sales organizations. Instead of sitting in meetings wondering why leads aren't

converting, you have specific data pointing to specific problems that can be addressed with specific solutions.

Equally important is establishing clear exit criteria for each stage. If you have three sales representatives and they're all using different reasons for why prospects don't advance, you can't identify patterns or systemic issues. Standardizing these criteria ensures that everyone is measuring success and failure consistently, providing clean data for analysis and improvement.

The impact of this approach is significant. Companies that use customer insights to guide their strategies see 23 times more ROI than those that don't. This isn't just about having better data—it's about building your entire go-to-market approach around how customers actually want to buy rather than how you want to sell.

Breaking Down the Sales and Marketing Handoff

The handoff between marketing and sales represents one of the most critical—and most frequently botched—baton passes in go-to-market execution. The traditional dynamic creates an adversarial relationship that serves no one well.

Sales teams complain: "These leads are terrible. We can't convert any of them. Marketing needs to give us better leads." Marketing teams fire back: "We gave you great leads that met all the scoring criteria. If you knew how to sell, you'd be able to convert them."

This age-old conflict persists because the traditional funnel structure creates misaligned incentives. Marketing gets measured on Marketing Qualified Leads (MQLs), while sales gets measured on closed deals. The problem is that marketing can control lead volume by manipulating scoring criteria or purchasing lists, but this doesn't necessarily translate to revenue.

If a marketing leader is 400 names short of their quarterly lead target, they can buy a list and hit their number. But did this help the company? Not at all. It just added names to the database without improving the quality of prospects entering the sales process.

The solution is to shift marketing's focus from leads to meetings. Instead of measuring success based on MQLs, marketing should be accountable for qualified meetings that sales can actually work with. This change is scary for marketing leaders because they can't fully control meeting outcomes—they have to rely on sales development representatives to make calls and book appointments. But this interdependence is exactly what creates alignment.

When marketing is measured on meetings, they work closely with sales development to ensure messaging resonates and targeting is accurate. If the last five prospects didn't convert to meetings, the sales team provides immediate feedback: "That message didn't work" or "These aren't the right people—we should be talking to X, Y, Z instead of A, B, C."

This creates a collaborative dynamic where both teams work toward the same goal. Marketing moves from being considered an expense center to being part of the revenue-generating engine. They're no longer throwing leads over the fence and hoping someone catches them—they're actively participating in the first step of revenue creation.

The formula for this approach is straightforward. If you know your average sale price and your annual recurring revenue goal, you can work backwards to determine how many sales you need, how many opportunities those sales require, and how many meetings those opportunities demand. This gives you a concrete quarterly meeting target that the entire go-to-market team can rally around.

For example, if you need 50 meetings per quarter to hit your revenue goal, everyone—marketing, sales development, and sales—works toward that number. Marketing doesn't have separate lead targets that may or may not translate to revenue. Instead, they're directly connected to the pipeline from day one.

The Operations Factor: Building Systems for Seamless Handoffs

Operations represents the third leg of the go-to-market relay, and it's often the most undervalued. Many people view operations as the team that orders supplies, generates reports for board meetings, or handles logistics. This

perspective dramatically underestimates the role operations should play in go-to-market success.

When operations leaders are brought into sales and marketing conversations, they can build systems with the precision required for smooth handoffs. They understand that successful baton passes require exact timing, clear communication, and practiced coordination.

Consider what actually happens when runners hand off a baton at Olympic speeds. There's tape on the track that signals when the receiving runner should start accelerating. The timing is calculated based on the typical speed of the approaching runner and the acceleration pattern of the receiver. If the first runner is having the race of his life and running faster than ever before, the receiver might not be in the right position for the handoff. The baton ends up on the ground.

This same precision is required in go-to-market operations. Every handoff point needs clear signals, defined responsibilities, and practiced execution. Without this operational excellence, even the best marketing and sales talent will drop the baton.

I recently worked with a company that attended a trade show and collected a promising list of leads. Two weeks later, when we tried to review those leads in their system, they weren't there. The marketing manager thought sales operations was handling it. Sales operations thought marketing was responsible. Meanwhile, the opportunity to follow up with warm prospects from the event had passed.

This kind of breakdown happens constantly when handoffs aren't clearly defined and systematically managed. Operations ensures that leads from events are loaded within 24 hours, properly categorized, assigned to the right sales representatives, and flagged for appropriate follow-up timing. They build workflows that make these processes automatic rather than dependent on assumptions about who's doing what.

The visibility and accountability that operations provides becomes even more critical as companies scale. What might work when handled informally by three people breaks down completely when the team grows to ten or twenty.

Documented processes and systematic handoffs are what enable sustainable growth.

Companies that get their sales, marketing, and operations teams aligned see conversion rate improvements of 67% according to research from Marketo. This isn't a small optimization—it's a fundamental transformation in go-to-market effectiveness.

Mapping Every Handoff: The Devil in the Details

When I ask business leaders what happens to a lead after they collect it at an event, I typically get a high-level answer: "Marketing loads it, nurtures it, and passes it to sales. Our SDR makes calls and either converts it to a deal or puts it back in nurture."

At a very high level, this is accurate. However, there are 20 to 40 individual steps buried within that simple description, and each step represents a potential point of failure. If any one of these handoffs breaks down, you lose those leads entirely.

The solution is to map every single handoff in detail. Sit down with your entire go-to-market team and trace the journey of a lead from initial capture to closed deal. For each step, identify exactly what happens, who's responsible, and what triggers the next action.

For example, the process might start with an event manager collecting leads and cleaning the list by removing competitors, partners, and personal email addresses. Hot leads from the event might need immediate routing to account executives, while others go through standard lead processing. The cleaned list then goes to the CRM, where it needs account matching to ensure proper sales territory assignment.

Each of these steps should have a specific person's name attached, not just a role or department. The more detailed you can be, the better. If adding leads to the CRM involves five sub-steps, document all five. This level of detail serves multiple purposes: it ensures nothing falls through the cracks, it provides training material for new hires, and it creates a baseline for continuous improvement.

Your operations team can then build your CRM and marketing automation tools to support this exact workflow, with alerts and tracking at each stage. Instead of hoping that handoffs happen correctly, you have systems that ensure they do.

Research shows that companies documenting their processes for scaling are 2.5 times more likely to succeed long-term. This isn't bureaucracy for its own sake—it's the foundation of reliable execution that enables sustainable growth.

The Technology Stack: Enabling Precision at Scale

Behind every smooth go-to-market operation is a technology stack that enables rather than hinders the handoff process. While the specific tools may vary by company size and industry, the core capabilities remain consistent.

At minimum, you need a CRM system to track customer relationships and sales pipeline, marketing automation to nurture prospects and score engagement, and communication tools to enable coordination between teams. Many companies can consolidate some of these functions—HubSpot, for example, provides both CRM and marketing automation in a single platform.

The key is ensuring that your technology stack supports your defined handoff processes rather than forcing you to work around tool limitations. Your operations team should configure these systems to match your mapped workflows, with appropriate alerts, routing rules, and reporting capabilities.

More sophisticated operations might include business intelligence tools for deeper analytics, customer success platforms for post-sale handoffs, and integration platforms to ensure data flows smoothly between systems. The goal isn't to have the most tools, but to have the right tools configured properly to support your specific go-to-market process.

Learning from the Winners: Execution Over Talent

Italy won the 4x100 relay at the 2024 Olympics, despite not being the favorite. They didn't have the fastest individual runners or the most impressive qualifying times. What they had was flawless execution of every single baton

handoff. They kept their eyes on the prize and executed exactly as they had trained.

This is the lesson for go-to-market teams: talent alone isn't enough. You can hire the best salespeople, the most creative marketers, and the most efficient operations professionals, but if they can't work together seamlessly, you'll never reach your potential.

The companies that win in competitive markets are those that master the handoffs. They align their teams around common goals, map their processes in detail, build systems that enable rather than hinder collaboration, and practice their execution until it becomes automatic.

The Coaching Imperative: Getting Help Where You Need It

Starting a company or building a small business is an incredible achievement, but it doesn't make you an expert in every aspect of business operations. The most successful entrepreneurs recognize where they need help and aren't afraid to ask for it.

I've seen the same mistakes made repeatedly by small businesses across different industries and geographies. These aren't failures of intelligence or effort—they're simply the result of not knowing what you don't know. A coach, consultant, or advisor who has been through these challenges before can help you avoid predictable pitfalls and accelerate your growth curve.

The investment in getting help pays dividends far beyond the cost. Instead of learning through expensive trial and error, you can benefit from someone else's experience and focus your energy on the areas where your expertise truly matters. Don't let pride or budget concerns prevent you from getting the coaching that could transform your business trajectory.

Your go-to-market execution is too important to leave to chance. Like Olympic relay teams, you need to practice your handoffs until they become automatic. The companies that master this precision will leave their competition wondering what happened, while those that don't will keep dropping the baton at the most critical moments.

The choice is yours: will you be the team that drops the baton despite having world-class talent, or will you be Italy—the team that wins gold through flawless execution?

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**Designing Access: Building Inclusive Spaces for Every Strength by Annelie Roux,
Rosie Arcuri, Rebeca Aguirre and Deborah Vick**

"If it's not accessible, it's not sustainable. Systems do not sustain themselves. People sustain systems. And people must be able to enter, use, and benefit from what we build."

In the rapidly evolving landscape of modern business, leaders are constantly searching for untapped opportunities and competitive advantages. Yet one of the most significant opportunities remains largely overlooked: accessibility. Far from being merely a compliance checkbox, accessibility represents a fundamental shift in how we think about business strategy, customer engagement, and sustainable growth.

The numbers tell a compelling story. One in four Americans lives with a disability, representing not just a substantial market segment, but a community of skilled professionals, innovative problem-solvers, and loyal customers. When we consider the global accessibility market opportunity, we're looking at a trillion-dollar ecosystem that includes people with disabilities, their advocates, caregivers, and families. This isn't theoretical – it's a measurable economic force that forward-thinking businesses are beginning to harness.

Reframing the Accessibility Conversation

The traditional approach to accessibility has been reactive: build first, accommodate later. This mindset treats accessibility as an add-on feature, something to bolt onto existing systems when legally required. But this perspective fundamentally misunderstands both the nature of disability and the power of inclusive design.

Consider the reality that accessibility needs are far more common than most business leaders realize. Disability encompasses visible conditions like blindness or mobility impairments, but it also includes invisible challenges such as chronic pain, ADHD, hearing loss, or cognitive differences. Many of these conditions are temporary or situational – a broken arm that makes typing difficult, a migraine that increases light sensitivity, or simply the natural changes that come with aging.

The key insight is that when businesses design for accessibility from the ground up, they don't just serve people with disabilities better – they create superior experiences for everyone. This phenomenon, known as the curb cut effect, demonstrates how inclusive design benefits far beyond its intended audience. Curb cuts were originally mandated to help wheelchair users navigate sidewalks, but they now benefit parents with strollers, delivery workers with hand carts, travelers with wheeled luggage, and countless others navigating urban environments.

The Hidden Costs of Inaccessible Hiring

In the employment sector, the accessibility gap represents both a moral failing and a massive missed opportunity. Globally, only one in three people with disabilities are employed, compared to their non-disabled counterparts. In the United States, this gap is even wider, particularly for women with disabilities. This isn't a motivation problem – it's a design problem embedded in how we structure job opportunities.

Traditional hiring practices create unnecessary barriers at every stage. Job postings often include irrelevant requirements like "driver's license required" for remote positions or "ability to lift 30 pounds" for desk jobs. These seemingly standard requirements can exclude qualified candidates who might navigate to different locations using public transportation or ride-sharing, or who excel at the intellectual demands of a role regardless of physical lifting capacity.

The interview process itself often disadvantages candidates with disabilities. Timed assessments may penalize someone who processes information differently but produces higher-quality work given adequate time. Emphasis on eye contact and traditional social cues can unfairly disadvantage candidates who are blind, autistic, or from different cultural backgrounds. The focus on how someone presents rather than what they know creates artificial barriers to talent acquisition.

For entrepreneurs and small business owners, inclusive hiring practices offer particular advantages. The flexibility that characterizes many small businesses – variable hours, remote work options, project-based assignments – naturally aligns with the accommodation needs of many people with disabilities.

Someone with chronic pain might be unavailable for traditional 9-to-5 hours but highly productive during evening hours when their symptoms are better managed. A person with autism might excel at detailed analytical work in a quiet home environment that would be challenging in a busy open office.

The business case for inclusive hiring extends beyond accessing untapped talent. Employees with disabilities often demonstrate exceptional loyalty and retention rates. Having experienced the difficulty of finding inclusive employment, they tend to stay longer with companies that value their contributions. They also bring unique problem-solving perspectives, having navigated accessibility challenges throughout their lives. This innovation mindset can benefit entire teams and organizations.

The AI Revolution and Speech Accessibility

The intersection of artificial intelligence and accessibility reveals both tremendous promise and significant gaps in current technology development. Voice-activated AI systems have become ubiquitous, from smartphone assistants to smart home devices, promising to make technology more intuitive and accessible. Yet these same systems often fail spectacularly for users whose speech patterns don't match the narrow parameters of their training data.

Current AI voice systems are predominantly trained on fast, fluent speech from limited demographic samples. This creates systematic exclusion for individuals with speech patterns affected by neurological conditions, stroke recovery, cerebral palsy, Parkinson's disease, or even age-related voice changes. The result is technology that consistently misinterprets, cuts off, or entirely ignores communication from users with non-standard speech patterns.

The daily impact of this technological failure is profound. Imagine trying to use voice commands to control your smart home devices, only to have the system consistently misunderstand your requests. Picture attempting to dictate text messages or emails, but having the AI consistently produce garbled output that doesn't reflect your intended communication. For someone with limited mobility who relies on voice control, these failures represent fundamental barriers to independence and participation in digital life.

The global AI voice generator market is experiencing explosive growth, with a compound annual growth rate of 29% from 2024 to 2030. This represents a transformative expansion that signals massive market opportunity. What's particularly promising is the emerging trend of training AI voice models on disordered speech patterns. When AI systems learn from diverse speech samples – including voices shaped by various medical conditions, different accents, and atypical patterns – they become more robust and capable overall.

This inclusive approach to AI development exemplifies the curb cut effect in technology. An AI system trained to understand someone with cerebral palsy becomes better at understanding regional accents, children's developing speech patterns, or anyone speaking in a noisy environment. The technology becomes fundamentally more versatile and valuable for all users.

The business opportunity in accessible AI is substantial. The specific market for AI voice generation accessibility represents over \$21 billion globally, while the broader accessibility market – including people with disabilities, their advocates, caregivers, and families – approaches trillion-dollar scale. Companies that prioritize inclusive AI development from the outset position themselves to capture this growing market while creating genuinely superior technology.

Universal Design as Business Strategy

The concept of universal design offers a framework for thinking about accessibility as integral to business strategy rather than an afterthought. Universal design means creating products, services, and environments that are usable by all people, to the greatest extent possible, without the need for specialized adaptations.

In physical spaces, universal design principles create environments that welcome everyone through the front door. This means considering the complete journey from parking to seating, from entrance to restroom, from lobby to meeting room. Effective universal design integrates accessibility seamlessly – ramps that curve through landscaping rather than awkward add-on structures, lighting that reduces glare while creating ambiance, acoustic design that supports hearing aids while creating pleasant soundscapes for everyone.

The business impact of accessible physical design extends beyond compliance. Spaces that are truly welcoming to people with disabilities signal inclusivity to all customers and employees. They accommodate the hidden disabilities that affect many people – the parent managing ADHD who benefits from reduced sensory overwhelm, the executive with arthritis who appreciates lever handles and comfortable seating, the customer with low vision who navigates more easily with high-contrast signage.

In digital environments, universal design principles create websites, applications, and online experiences that work for diverse users and assistive technologies. This includes clear navigation structures that benefit users with cognitive disabilities and busy multitaskers alike, video captions that serve deaf users and people in noisy environments, and color contrast that helps users with visual impairments and anyone using devices in bright sunlight.

The employment applications of universal design are particularly powerful. Instead of rigid job structures that exclude capable candidates, universal design thinking creates flexible frameworks that accommodate diverse working styles and life circumstances. This might include part-time career paths with prorated benefits, remote-friendly roles without penalties, job carving that matches individual strengths to specific responsibilities, and performance measurement based on outcomes rather than hours logged.

The Technology Transformation

The rapid advancement of assistive technology has created unprecedented opportunities for people with disabilities to work around inaccessible systems. Smart glasses can read text aloud and provide real-time translation. Apps can give users digital voices or convert speech to text and text to speech. These innovations are genuinely empowering and life-changing.

However, the proliferation of workaround technologies also highlights a fundamental question: why should anyone have to engineer solutions to barriers that businesses could simply remove from the start? When a blind professional uses screen reader software to navigate a poorly designed website, they're demonstrating remarkable adaptability – but they're also compensating for preventable design failures.

The most successful businesses are recognizing that building accessibility into their core systems creates better experiences for everyone while reducing the burden on users with disabilities to constantly adapt and work around barriers. This approach also future-proofs businesses against demographic changes, as aging populations worldwide will increasingly require accessible design considerations.

Fashion and Everyday Inclusion

The evolution of adaptive fashion illustrates how accessibility can drive innovation and market expansion in unexpected sectors. For decades, clothing designed for people with disabilities looked medical, institutional, and outdated. The assumption seemed to be that people with disabilities didn't care about style, self-expression, or looking professional and attractive.

This assumption was both wrong and economically shortsighted. Mainstream fashion brands like Tommy Hilfiger have discovered significant market demand for adaptive clothing that combines style with practical accessibility features. Magnetic closures, seated-wear designs, and openings that accommodate medical devices serve people with disabilities while also appealing to aging consumers, busy parents, and anyone who values convenience and comfort.

The sustainability implications of adaptive fashion extend beyond individual dignity and self-expression. When clothing is designed to accommodate diverse body types and functional needs, it lasts longer and fits better, reducing returns and waste. When product descriptions include detailed measurements for seated wear and clear explanations of adaptive features, customers make better purchasing decisions, reducing the cycle of buying, returning, and discarding.

Community Spaces and Belonging

The Magical Bridge Foundation demonstrates how universal design principles can transform community spaces into genuine centers of belonging. Founded by a mother whose daughter with developmental delays needed inclusive play opportunities, Magical Bridge parks integrate accessibility into every design element from the beginning.

These parks feature wheelchair-accessible climbing structures and slides, sensory zones that provide stimulation without overwhelming, spinning devices that accommodate various mobility levels, and quiet retreat spaces where individuals can reset and rejoin activities. The parks don't segregate adaptive equipment – instead, they create shared spaces where children and adults of all abilities play together naturally.

The success of Magical Bridge parks extends beyond recreation. They've become community centers, outdoor classrooms, and models for inclusive design that other communities are replicating internationally. Schools bring entire classes to learn about adaptive play and inclusion through direct experience. Families drive hours to visit because these spaces offer something unavailable elsewhere – true belonging for everyone.

The business lessons from Magical Bridge apply across sectors. When accessibility is central to design rather than an afterthought, the result isn't just compliance – it's innovation that creates new value and attracts broader audiences. The parks have earned county awards, expanded internationally, and become sustainable community assets because they serve everyone better.

Implementation Framework

For business leaders ready to embrace accessibility as a strategic advantage, the path forward involves systematic assessment and incremental improvement across four key areas:

The Front Door Test involves tracing the complete customer or employee journey from initial contact through full participation. This means examining not just physical accessibility, but communication accessibility, process accessibility, and dignity throughout the experience. If someone using a wheelchair, someone who is blind, someone with autism, or someone managing chronic illness couldn't navigate your systems with dignity, then barriers need to be removed.

The Flexibility Audit examines work structures, service delivery, and customer interaction models for unnecessary rigidity. Many business processes assume everyone works the same way, communicates the same way, and has the same

life circumstances. Flexibility in scheduling, communication methods, and service delivery often costs nothing to implement but dramatically expands who can participate successfully.

The Dignity Assessment involves engaging people with diverse disabilities as consultants and testers for your products, services, and spaces. This isn't about charity or token representation – it's about accessing expertise that can identify friction points and improvement opportunities that others might miss. People with disabilities are the experts on accessibility, and their insights can drive innovation and competitive advantage.

The Access Budget Line means building accessibility considerations into every capital project, product development cycle, and service enhancement from the beginning. When accessibility is a budget line item rather than an afterthought, it gets implemented. When it's considered only after other decisions are made, it gets compromised or eliminated.

The Competitive Advantage

Businesses that embrace accessibility as a core strategy rather than a compliance requirement position themselves for significant competitive advantages. They access talent pools that competitors overlook. They create customer loyalty among communities that have been underserved. They develop products and services that work better for everyone. They build resilience against demographic changes and economic shifts.

The accessibility advantage isn't just about doing the right thing, though that matters enormously. It's about recognizing that inclusive design creates better solutions, stronger communities, and more sustainable business models. When we build systems that work for people with disabilities, we build systems that work better for everyone.

The future belongs to businesses that understand this connection between accessibility and excellence. They'll capture markets that others ignore, attract talent that others overlook, and create experiences that others can't match. Most importantly, they'll build the kind of sustainable, inclusive economy that serves everyone's long-term interests.

The opportunity is clear, the tools are available, and the market is waiting. The question isn't whether accessibility makes business sense – it's whether your business will lead this transformation or follow others who recognize its strategic value. The choice to build accessibility into your business model from the ground up isn't just an investment in inclusion – it's an investment in your competitive future.

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Operation and Production Management Efficiency by Brandon T. Moore

"If you have the right leadership, you're going to have the right buy-in. They're going to set the right culture. The people are going to feel engaged. The people are going to feel wanted, listened to, respected. Transparency is going to be key. And he's going to practice what he preaches. If the leader takes care of all that, guess what? Now your focus is efficiency."

When Brandon Moore steps onto a basketball court as a coach, he doesn't just see players running drills—he sees a living laboratory of operational efficiency in action. "What do we tell kids in basketball?" Moore asks. "You want to maximize your possessions, minimize your turnovers. That is operational efficiency." This sports analogy perfectly encapsulates Moore's philosophy as the owner and president of Motivated Minds Consulting LLC, where he specializes in operational efficiency and leadership development. His unique perspective reveals a fundamental truth that many organizations miss: true operational efficiency isn't just about cutting costs or implementing the latest technology—it's about creating a culture where people, processes, and performance align to deliver sustainable results.

Understanding Operational Efficiency Beyond Cost-Cutting

The traditional view of operational efficiency often begins and ends with cost reduction. Walk into most boardrooms, and you'll hear executives discussing efficiency primarily through the lens of financial savings. Moore challenges this narrow perspective, arguing that while cost management is important, it represents only one piece of a much larger puzzle.

"Most of the time, they talk about efficiency when it comes to finance, when it comes to cutting costs," Moore explains. "But that's not necessarily all of it. It's part of it, but it's not necessarily all of it because there are some cases where some businesses cannot afford to cut costs." This insight reveals a critical blind spot in many organizations' approach to efficiency improvements.

True operational efficiency encompasses maximizing output while reducing waste, optimizing resources, ensuring top-notch quality, maintaining positive throughput, and creating sustainable operations with minimal waste. It's

about creating a system where every element works in harmony to produce the best possible results with the resources available.

Consider Moore's basketball coaching analogy more deeply. A coach doesn't improve team efficiency by cutting the number of players or reducing practice time. Instead, they focus on ball handling drills, passing accuracy, conditioning, confidence building, and strategic decision-making. These investments in fundamentals create a team that naturally maximizes possessions and minimizes turnovers—the essence of efficient performance.

The same principle applies in business operations. Rather than simply reducing headcount or slashing budgets, organizations must invest in the fundamentals: process optimization, people development, strategic technology implementation, and performance management systems. These investments create a foundation for sustainable efficiency that goes far beyond short-term cost savings.

The Four Pillars of Efficiency Excellence

Moore identifies four critical drivers that form the foundation of operational efficiency: process optimization, people and skills development, technology and automation, and performance management metrics. Each pillar supports the others, creating a comprehensive framework for sustainable improvement.

Process Optimization: The Art of Smart Operations

Process optimization involves taking existing workflows and systematically improving them. "How can we make this process better?" Moore asks. "What can we do to make sure these people are in a position to be successful at the same time?" This dual focus on process improvement and people success distinguishes effective optimization from mere cost-cutting exercises.

Smart operations require leaders to examine every step of their processes, looking for reliability issues, identifying sources of downtime, and finding opportunities for improvement. This isn't about making dramatic changes overnight; it's about continuous refinement and enhancement of existing systems.

The key is seeing processes all the way through, from beginning to end, understanding how each step affects the next, and ensuring that improvements in one area don't create problems downstream. This holistic view prevents the common mistake of optimizing individual components at the expense of overall system performance.

People and Skills: The Human Element of Efficiency

"You want to put the right people in the right positions to be successful," Moore emphasizes. "And then you also want to maximize their skills and challenge them." This approach recognizes that operational efficiency ultimately depends on human performance and engagement.

Effective people optimization involves several key strategies. First, organizations must ensure proper role alignment, placing individuals in positions where their natural strengths can flourish. Second, they must invest in skill development, helping people grow beyond their current capabilities while maximizing their existing talents.

Perhaps most importantly, leaders must challenge their people appropriately. "Challenge people to do something else that they haven't done. Challenge them to be better at it," Moore suggests. This approach creates a culture of continuous improvement where efficiency becomes a natural byproduct of engaged, growing employees.

The basketball analogy applies here as well. A good coach doesn't just put players in their preferred positions; they develop each player's skills, challenge them to improve, and create systems where individual growth contributes to team success.

Technology and Automation: The Double-Edged Sword

Technology and automation represent both tremendous opportunity and significant risk in the pursuit of operational efficiency. Moore acknowledges this complexity, noting that while automation can dramatically improve efficiency, it requires careful implementation and ongoing human oversight.

"Even with automation, you got to have a person. You got to have one or two people that can master whatever automation that's there," Moore explains.

This insight highlights a critical point often overlooked in automation discussions: technology doesn't eliminate the need for skilled people; it changes the type of skills required.

In industries like automotive manufacturing and food production, automation provides clear benefits. In automotive, robotic systems can handle complex tasks like flipping cars for painting, installing engines and transmissions, and positioning stabilizing rods—tasks that would be difficult or dangerous for humans. In food production, automation reduces human contact, minimizing contamination risks and improving consistency.

However, successful automation requires more than just installing equipment. Organizations must invest in training people to operate, maintain, and optimize automated systems. They must also recognize that automation works best when it complements human capabilities rather than simply replacing them.

Performance Management Metrics: The Report Card System

Performance management metrics serve as the report card for operational efficiency efforts. "This is like grading your performance," Moore explains. "And then if somebody's or automation's performance is not up to par, now you dig deep."

Effective performance management goes beyond simple measurement; it involves understanding what the numbers mean and taking appropriate action based on the insights they provide. When performance falls short of expectations, Moore recommends the "five whys" technique—asking why five times to get to the root cause of problems.

This approach transforms metrics from passive reporting tools into active improvement drivers. Instead of simply tracking performance, organizations use metrics to identify opportunities, diagnose problems, and guide decision-making.

Key Metrics That Drive Success

Understanding which metrics to track and how to interpret them is crucial for operational efficiency success. Moore identifies several critical measurements that provide insight into different aspects of operational performance.

First Pass Yield: The Quality Indicator

First pass yield measures how often products or services meet quality standards on the first attempt. "How many times can I turn this radio on and it worked the first time?" Moore asks, drawing from his automotive industry experience. "If that happens, ding, ding, ding, green checkmark, move on to the next one."

This metric provides powerful insight into the effectiveness of processes and people working together. High first pass yield indicates that procedures are being followed correctly, people are properly trained, and systems are functioning as designed. Low first pass yield suggests problems with one or more of these elements.

The beauty of first pass yield is its simplicity and clarity. There's no ambiguity—either something works correctly the first time, or it doesn't. This binary nature makes it an excellent metric for driving improvement efforts and measuring progress over time.

Cycle Time: The Rhythm of Operations

Cycle time measures how long it takes to complete specific tasks or processes. "Whatever you're working on, how fast does it take you to put an airbag into a vehicle? How fast does it take you to screw five screws in?" Moore explains. This metric helps organizations understand their operational rhythm and capacity.

Understanding cycle time enables accurate forecasting and planning. If a production line processes 13 trucks per minute, managers can calculate hourly, shift, and daily capacity. This information supports scheduling decisions, resource allocation, and customer commitments.

Cycle time also reveals opportunities for improvement. By analyzing the components of cycle time, organizations can identify bottlenecks,

inefficiencies, and optimization opportunities. The key is measuring cycle time consistently and using the data to drive continuous improvement efforts.

Downtime and Mean Time Between Failure: The Reliability Factors

Downtime represents lost opportunity and direct financial impact. "Every time you're down, you're costing your company thousands, thousands, thousands, thousands of dollars," Moore emphasizes. This stark reality makes downtime reduction a critical priority for operational efficiency.

Mean Time Between Failure (MTBF) provides insight into system reliability. This metric helps organizations understand how long they can expect equipment or processes to function before requiring maintenance or repair. Higher MTBF indicates more reliable systems and lower operational risk.

Together, these metrics help organizations balance efficiency with reliability. While it might be tempting to push systems to their limits for maximum output, understanding downtime costs and failure patterns helps leaders make informed decisions about maintenance, replacement, and improvement investments.

Process Improvement Methodologies: Choosing Your Path

The world of process improvement offers numerous methodologies, each with its own strengths and applications. Moore identifies several key approaches: Lean, Six Sigma, Total Quality Management (TQM), Kaizen, Business Process Reengineering, Continuous Improvement, Agile, and Scrum. "All of these methodologies, all of them, are about one thing: process improvement," he explains.

Lean Six Sigma: Moore's Preferred Approach

Moore personally focuses on Lean Six Sigma combined with continuous improvement. This combination provides a comprehensive framework for identifying waste, improving quality, and creating sustainable change. Lean principles focus on eliminating waste and optimizing flow, while Six Sigma emphasizes data-driven quality improvement.

The power of Lean Six Sigma lies in its systematic approach to problem-solving and improvement. Rather than making changes based on hunches or

preferences, this methodology requires data analysis, hypothesis testing, and measurable results. This disciplined approach increases the likelihood of successful improvements and provides a framework for sustaining gains over time.

Continuous improvement complements Lean Six Sigma by creating a culture of ongoing enhancement. "You're always trying to improve something," Moore notes. This might involve cleaning and housekeeping improvements, better organization systems, or simple innovations like cutting tool shapes into foam to ensure proper storage.

The Toyota Kata: Learning from Excellence

Moore enthusiastically recommends "The Toyota Kata" as essential reading for anyone interested in process improvement. This book explores how Toyota developed its legendary production system and culture of continuous improvement.

The Toyota Kata demonstrates how systematic practice and coaching can create organizational capabilities that drive sustained excellence. Rather than relying on individual heroics or sporadic improvement efforts, Toyota developed routines and practices that make improvement a natural part of daily work.

This approach offers valuable lessons for any organization seeking to improve operational efficiency. By developing systematic practices and coaching capabilities, leaders can create cultures where improvement happens naturally and continuously.

Choosing Your Methodology

The choice of improvement methodology depends on organizational needs, culture, and circumstances. "I can't tell you which ones to do because they're going to be based upon your position and based upon what you're comfortable with," Moore explains.

Some organizations benefit from the structured approach of Six Sigma, while others prefer the flexibility of Agile methodologies. The key is selecting an approach that fits the organization's needs and committing to it fully rather

than jumping between different methodologies without giving any one approach time to take root.

Technology Tools for Efficiency Enhancement

Modern technology offers numerous tools for enhancing operational efficiency. Moore identifies six key categories: workflow management, robotic process automation (RPA), analytics and dashboards, IoT sensors, enterprise resource planning (ERP), and collaboration tools.

Workflow Management: Optimizing the Flow

Workflow management tools help organizations understand and optimize how work moves through their systems. "How is it flowing? How does process one all the way to process 20 flow?" Moore asks. These tools provide visibility into work processes and identify opportunities for improvement.

Effective workflow management reveals bottlenecks, redundancies, and inefficiencies that might not be apparent from ground-level observation. By mapping and analyzing workflows, organizations can redesign processes for better efficiency and effectiveness.

Robotic Process Automation: Handling Repetitive Tasks

RPA addresses repetitive, rule-based tasks that don't require human judgment or creativity. However, Moore cautions that automation isn't a cure-all. "If you're on the fence about it, here's some tools that will help you to boost that efficiency if you do have to go to robotics."

The key to successful RPA implementation is understanding its limitations and monitoring its performance. If an automated system crushes every tenth box or takes unnecessary breaks, it's actually reducing efficiency rather than improving it. Proper implementation requires ongoing oversight and optimization.

Analytics and Dashboards: Making Data Actionable

Analytics and dashboards transform raw data into actionable insights. "It's a great way to give a snapshot to your managers and give a snapshot to your leads," Moore explains. "Hey guys, this is how we're doing number-wise. Our goal is here, but we're here."

Effective dashboards provide clear, visual representations of performance against goals. They enable quick identification of problems and opportunities, supporting faster decision-making and more targeted improvement efforts. The key is presenting information in a way that drives action rather than simply displaying data.

Enterprise Resource Planning: Integration and Coordination

ERP systems integrate various organizational functions—finance, HR, manufacturing, supply chain—into a single, coordinated system. This integration eliminates silos, improves communication, and enables better planning and coordination across functions.

However, ERP implementation requires careful planning and change management. The benefits of integration must be weighed against the complexity and cost of implementation. Success depends on proper training, process alignment, and ongoing optimization.

Building a Culture of Efficiency Through Leadership

The connection between leadership and operational efficiency forms the cornerstone of Moore's philosophy. "If you have the right leadership, you're going to have the right buy-in. They're going to set the right culture. The people are going to feel engaged," he explains.

Leadership Buy-In: Setting the Tone from the Top

Leadership buy-in goes beyond verbal support; it requires genuine commitment and visible action. Moore emphasizes the importance of alignment between senior leadership and front-line managers. When leadership at all levels shares a common vision and commitment to efficiency, the entire organization benefits.

This alignment is particularly crucial when implementing changes or improvements. If senior leaders support efficiency initiatives but middle managers resist them, or vice versa, the efforts will likely fail. True buy-in requires consistent messaging, adequate resources, and sustained support throughout the implementation process.

Clear Communication: Eliminating Gray Areas

Clear communication eliminates confusion and ensures everyone understands expectations. Moore uses a parenting analogy: "When you say no, there's no gray area. It's no. No, you cannot have chocolate at 11 o'clock at night. No, you cannot drink a pop."

In organizational settings, clear communication means providing specific, unambiguous direction and expectations. It means explaining not just what needs to be done, but why it's important and how it contributes to larger goals. This clarity helps employees understand their role in efficiency efforts and makes it easier for them to contribute effectively.

Moore also notes that operators are often more perceptive than leaders realize: "Your operators are a whole lot smarter than what you think. Especially those that have been around 10 plus years. They've seen the changes." This experience makes clear, honest communication even more important.

Front-Line Involvement: Leveraging Ground-Level Expertise

Front-line employees have intimate knowledge of daily operations and often see problems and opportunities that aren't visible from management levels. "They have a pulse of the people. They have a better pulse than you do of the people," Moore explains.

Effective leaders actively seek input from front-line employees and incorporate their insights into improvement efforts. This involvement serves multiple purposes: it taps into valuable knowledge and experience, it increases buy-in for changes, and it demonstrates respect for employees' expertise and contributions.

Moore shares an example from his own experience: "I have a production manager now who, if I've done something wrong or challenging or whatever, oh, he voices his opinion. And we have healthy discussions about it. Because it may be something I just did not know."

Training and Development: Building Capability

Effective training goes beyond computer-based modules and annual requirements. "I'm talking about the hands-on training," Moore emphasizes. "Every job should have a JSA job safety analysis. Every job should have a job instruction sheet that literally gives you a step-by-step on how to complete said job."

Comprehensive training includes detailed job instructions, safety procedures, and quality standards. It involves hands-on practice, mentoring, and ongoing reinforcement. Most importantly, it challenges people to grow and develop new capabilities while maximizing their existing strengths.

Training should also be ongoing rather than one-time events. As processes change and improve, training must evolve as well. Regular retraining ensures that improvements become embedded in daily practice rather than temporary changes.

Recognition and Incentives: Reinforcing Success

Recognition and incentives help sustain momentum and reinforce desired behaviors. Moore suggests celebrating quick wins and providing incentives for achieving goals: "Give your team some incentives for doing so well, for showing up every day, for not being late, for completing said number or whatever output you want them to have."

The key is making recognition timely, specific, and meaningful. Generic praise has little impact, but specific recognition of particular achievements or behaviors reinforces their importance and encourages repetition.

Moore also emphasizes the importance of recognizing quick wins: "Sometimes those quick wins are the most positive thing that some people are going to hear." These early successes build confidence and momentum for larger improvement efforts.

Common Pitfalls and How to Avoid Them

Even well-intentioned efficiency efforts can fail if organizations fall into common traps. Moore identifies several critical pitfalls and provides guidance for avoiding them.

Automating Bad Processes: Technology Isn't a Magic Fix

One of the most expensive mistakes organizations make is automating inefficient or ineffective processes. "Sometimes leadership may get into that thought process of, okay, this process is terrible. Let's automate it, thinking that automation is the end all be all," Moore warns.

Whether performed by humans or machines, bad processes produce poor results. Before implementing automation, organizations must first optimize their processes. This might involve eliminating unnecessary steps, improving quality controls, or redesigning workflows for better efficiency.

The lesson is clear: fix the process first, then consider automation. Technology should enhance good processes, not mask bad ones.

Lack of Buy-In: The Foundation of Failure

Without genuine buy-in from leaders and employees, efficiency efforts are doomed to fail. "People know when you're BSing them," Moore states bluntly. "People know when you're messing with them. People know when you're not serious."

Experienced employees, particularly those with 10 or more years of service, have seen numerous improvement initiatives come and go. They can quickly distinguish between genuine commitment and superficial efforts. If leaders don't demonstrate real commitment through their actions and decisions, employees will withhold their support.

Building genuine buy-in requires consistency between words and actions, adequate resource allocation, and sustained commitment even when efforts face obstacles or setbacks.

Doing Too Much at Once: The Multitasking Trap

Organizations often try to implement too many changes simultaneously, diluting their efforts and reducing their chances of success. "Slow down. See it all the way through. Focus," Moore advises. "Focus on one thing. Master that and then move to the next one."

While multitasking might seem efficient, it often leads to incomplete implementations and suboptimal results. It's better to fully implement one

improvement and ensure it's working effectively before moving to the next priority.

When multitasking is necessary, Moore suggests doing it confidently and strategically, ensuring that parallel efforts don't interfere with each other or reduce overall productivity.

Ignoring Culture: The Hidden Foundation

Organizational culture can either support or undermine efficiency efforts. Moore draws an analogy to family dynamics: "Your family establishes a certain culture about themselves. And it's working. You don't let anything or anybody in that circle that's going to compromise that."

If an organization has developed a positive, productive culture, leaders must protect and nurture it. This means being selective about new hires, resisting changes that would undermine cultural strengths, and actively reinforcing cultural values through decisions and actions.

Conversely, if the existing culture doesn't support efficiency goals, leaders must actively work to change it. This requires patience, consistency, and sustained effort, as cultural change typically takes years rather than months.

Best Practices for Sustainable Success

Based on his extensive experience, Moore offers several best practices for achieving and sustaining operational efficiency improvements.

Start with High-Impact Processes

"What processes have the most impact? Those are the ones you want to start with," Moore advises. While high-impact processes might be the most challenging to improve, they also offer the greatest potential returns.

Starting with high-impact processes also sends a clear message about the organization's commitment to meaningful change. It demonstrates that leaders are willing to tackle difficult challenges rather than pursuing only easy wins.

Additionally, improvements in high-impact processes often create positive ripple effects throughout the organization. "Sometimes when you get those processes together, everything else kind of falls in place," Moore notes.

Use Cross-Functional Teams

Cross-functional teams bring diverse perspectives and expertise to improvement efforts. "You're putting people in a position to be successful, but you're also hearing their voice," Moore explains. "And you're also allowing them to work together cross-functionally."

Different departments often have unique insights into processes and problems. By bringing together people from various functions, organizations can develop more comprehensive solutions and avoid improvements that solve problems in one area while creating them in another.

Cross-functional teams also help build organizational capability and break down silos that can impede efficiency efforts.

Focus on Quick Wins to Build Momentum

Quick wins provide early evidence of success and build momentum for larger efforts. Moore uses another basketball analogy: "A couple charges, a couple deflections is the best way to steal the momentum from the other team and improve momentum on your team."

Quick wins demonstrate that improvement efforts are working and provide positive reinforcement for continued effort. They also help build confidence in the improvement process and the leadership driving it.

The key is identifying genuine improvements that can be implemented quickly, rather than superficial changes that don't create real value.

Maintain Transparency and Honesty

Transparency in sharing data, metrics, and progress builds trust and engagement. "When you're analyzing, when you're taking this data and these metrics, be transparent, be honest," Moore advises. "People, your operators want honesty. They just don't want you just to fluff them."

Honest communication about both successes and challenges helps build credibility and trust. It also enables employees to contribute more effectively when they understand the real situation rather than a sanitized version.

Transparency also includes sharing the reasoning behind decisions and changes, helping employees understand not just what is happening, but why it's happening.

Commit to Continuous Learning

Efficiency improvement is an ongoing journey rather than a destination. "They also want to learn, teach me how to do it better," Moore notes about employees' attitudes toward improvement efforts.

Organizations must invest in developing their people's capabilities while also learning from their experiences and results. This includes formal training, mentoring, knowledge sharing, and creating systems for capturing and applying lessons learned.

Continuous learning also means staying current with new methodologies, technologies, and best practices that could enhance efficiency efforts.

The Road Ahead: Implementing Efficiency Excellence

Moore provides a practical roadmap for organizations ready to begin their efficiency journey. The process starts with identifying key processes and establishing baseline metrics, then moves through organizing workshops, securing leadership sponsorship, and implementing improvements.

The timeline and governance structure must be carefully planned, with clear roles, responsibilities, and decision-making processes. Success requires sustained commitment, adequate resources, and the flexibility to adjust approaches based on learning and changing circumstances.

Perhaps most importantly, organizations must remember that operational efficiency is ultimately about people. Technology, processes, and metrics are important tools, but they only create value when combined with engaged, capable people working toward common goals.

The connection between leadership and efficiency that Moore emphasizes throughout his discussion isn't just a nice-to-have addition to technical improvements—it's the foundation that makes everything else possible. When leaders create cultures of engagement, transparency, and continuous improvement, operational efficiency becomes a natural outcome rather than an forced objective.

As organizations face increasing competitive pressure and the need to do more with less, the principles and practices Moore outlines provide a roadmap for sustainable success. The key is remembering that true efficiency comes not from cutting corners or reducing investment, but from optimizing the integration of people, processes, and technology to create value for customers and stakeholders.

The basketball court wisdom that began this discussion provides the perfect conclusion: maximize your possessions, minimize your turnovers, and always keep your eye on the ultimate goal. In business, as in sports, efficiency isn't about perfection—it's about consistent excellence in execution, continuous improvement, and the leadership to bring out the best in everyone on the team.

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Breaking Trauma Bonds to Build Business by Jessica Hammock

"Trauma doesn't have to do with the event. It has to do with our experience in the event. It results from us not being able to work through the natural processes of getting rid of the emotional and experiential and story memory as part of that."

The invisible threads that bind us to our past experiences often determine whether we soar in business or struggle against unseen forces. As entrepreneurs, we focus intensely on strategies, systems, and market conditions, yet many of us remain puzzled when our best-laid plans consistently fall short. What if the answer lies not in our business model, but in the unresolved emotional patterns that unconsciously drive our decisions?

Licensed trauma therapist and transformation coach Jessica Hamlock has worked extensively with entrepreneurs and business builders, discovering that trauma bonds—invisible emotional connections to past experiences—frequently sabotage even the most promising ventures. Her insights reveal how our deepest wounds can either fuel our greatest successes or become the very obstacles that keep us from achieving our dreams.

The Hidden Nature of Mental Pain

C.S. Lewis once observed that mental pain is less dramatic than physical pain, but far more common and harder to bear. The frequent attempt to conceal mental pain only increases its burden. "It's easier to say my tooth is aching than to say my heart is broken," Lewis noted. This profound truth illuminates why we readily visit the dentist for a toothache but find countless reasons to avoid addressing the deeper emotional injuries that shape our daily lives.

This avoidance becomes particularly costly in business, where our internal landscape directly influences our external results. The words spoken to us and about us throughout our lives create neural pathways that impact how we think, feel, and believe about ourselves. These beliefs, in turn, determine our capacity for success, our relationship with money, and our ability to build sustainable enterprises.

Understanding our complete nature requires recognizing that we exist as integrated beings: spirit, soul, and body, all connected through specific brainwave pathways. Alpha, beta, and theta brainwaves constantly facilitate communication between our heart (spirit), our mind (soul), and our physical form. When disruption occurs in one area through stress, trauma, or extreme emotional experiences, it creates a ripple effect throughout our entire system.

This interconnectedness explains why addressing only the logical, strategic aspects of business often falls short. Our emotions, stored memories, and unconscious patterns exert tremendous influence over our actions, regardless of what our rational mind believes should happen.

The Architecture of Human Needs

Dr. William Glasser's research reveals that human behavior stems from five basic categories of needs, extending far beyond the commonly recognized survival requirements of food, clothing, and shelter. These deeper needs include love and belonging, power (recognition, skills, success), fun, and freedom (independence and choice-making ability).

Understanding that behavior is communication—both our own and others'—transforms how we interpret challenges in business relationships. When clients become difficult, partners grow distant, or team members underperform, they're often communicating unmet needs rather than expressing personal failings or character flaws.

The need for love and belonging particularly impacts entrepreneurs, who often struggle with isolation and the pressure to constantly prove themselves. When someone accepts us authentically—including our unique communication style, our creative approach, or our unconventional methods—it fulfills this deep need and can dramatically shift our confidence and performance.

Recognition of these needs also helps explain why traditional business advice sometimes fails. A strategy that works brilliantly for someone whose primary need is power and recognition might completely backfire for someone whose deepest need is love and belonging. The key lies in identifying your core needs and building business practices that honor rather than violate them.

Understanding Your Motivational Blueprint

People are motivated by different core drives, and these motivations significantly impact how stress and trauma affect them. Some individuals thrive on fun and teamwork, naturally gravitating toward collaborative, social approaches to business. Others find their energy in serving good causes and helping people, preferring one-on-one connections over large networking events.

Still others are motivated by organization, facts, and figures, approaching opportunities with careful analysis and systematic thinking. These individuals might initially resist new ideas, not from negativity but from their natural tendency to thoroughly evaluate before committing. Finally, some people are driven by challenge and winning, comfortable with risk-taking and quick decision-making that might feel overwhelming to others.

This framework, known as GEMS (representing Sapphires, Pearls, Emeralds, and Rubies respectively), provides crucial insight into how different personality types absorb and process trauma. Typically, people absorb trauma most readily from those opposite on the spectrum. Rubies (challenge-oriented) and Pearls (service-oriented) often trigger each other's wounds, as do Sapphires (fun-focused) and Emeralds (systems-focused).

Understanding your motivational type helps you recognize your natural strengths while identifying areas where you need support. A fun-loving, team-oriented entrepreneur might excel at networking and relationship building but struggle with the detailed operational systems that ensure long-term success. Rather than viewing this as a personal failing, they can strategically partner with someone whose strengths complement their own.

Redefining Trauma: From Event to Experience

The mainstream understanding of trauma often focuses on dramatic events—car accidents, natural disasters, abuse, or violence. However, this perspective misses a crucial truth: trauma is not about the event itself but about our experience within that event. It represents an injury to our nervous system, not a character flaw or sign of weakness.

Multiple people can experience identical circumstances yet emerge with vastly different levels of impact. Some sustain what might be called "band-aid injuries" while others experience more significant damage. This variation occurs because trauma results from our inability to process and integrate the emotional and experiential memories associated with challenging events.

When our brain cannot successfully "zip together" the story of what happened with the emotions we felt, these experiences remain unresolved, creating ongoing symptoms and patterns that can persist for years or even decades. The good news is that trauma, because it often originates from breaks in relationship or unmet expectations, can be healed through healthy relationships and corrective experiences.

Beyond major traumatic events, many entrepreneurs struggle with what therapists call "little t trauma"—subtle experiences that injured the nervous system over time. These might include financial stress (like heart palpitations at the grocery store checkout), loss of loved ones, frequent shaming or bullying, being ostracized, experiencing poverty, or losing support systems through moves or changing circumstances.

These seemingly minor experiences can create significant barriers to business success, especially when they remain unacknowledged or unaddressed. The entrepreneur who experienced childhood poverty might unconsciously sabotage their business when it begins generating substantial income, or someone who was frequently criticized might struggle to put their work into the world despite having valuable offerings.

The Hidden Power of Trauma Bonds

Trauma bonds represent one of the most overlooked obstacles to business success. These invisible connections link us energetically and emotionally to the people, places, times, and circumstances where we sustained emotional injuries. Until these bonds are recognized and addressed, they continue to influence our behavior and limit our potential.

Time-based trauma bonds create patterns around specific periods. Some people experience recurring challenges every five or ten years, while others find certain times of year consistently difficult. An entrepreneur who

experienced a significant loss in August might find their nervous system automatically shifting every August, making it nearly impossible to successfully launch new projects during that month, regardless of market conditions or preparation.

Understanding seasonal energy patterns becomes crucial for business planning. The natural energy cycles of Earth's atmosphere support different activities throughout the year. Second and fourth quarters typically offer the strongest energy for launches and new initiatives, while summer often brings chaotic energy that makes sustained focus challenging.

Land-based trauma bonds connect us to specific locations where difficult experiences occurred. These bonds can extend beyond personal experience to collective trauma associated with particular places. Someone who experienced shame in a school classroom might find themselves unconsciously connected to everyone who experienced similar trauma in that same location, creating mysterious emotional responses that seem to come from nowhere.

Relationship trauma bonds create ongoing energetic connections to people who hurt us, while office trauma bonds attach to specific roles or titles. An entrepreneur stepping into a leadership position might unknowingly take on the unresolved trauma of previous leaders, creating unexpected challenges that have nothing to do with their personal capabilities.

Money trauma bonds perhaps most directly impact business success. These bonds, often connected to our earliest caregiver relationships, create unconscious patterns around earning, spending, and receiving money that can sabotage even the most well-planned business strategies.

The Emotional Landscape of Success

Emotions carry specific energy frequencies that directly impact our capacity for success. Lower-frequency emotions like guilt, shame, fear, and worry create what researchers call "stuck" states—internal contractions that pull our energy inward and limit our ability to take effective action.

Understanding that we typically operate within a 300-point emotional range on any given day reveals why addressing emotional patterns is crucial for

business success. Someone whose baseline emotion is worry (measuring 100 on the scale) will rarely be able to sustain the higher-frequency emotions necessary for creative problem-solving, inspired action, or confident leadership.

The "mad" emotions—anger, frustration, and irritation—actually represent progress from stuck states because they mobilize energy for action. While not comfortable, these emotions can move us out of depression and paralysis toward more productive states.

"Good life" emotions like acceptance, contentment, and routine functionality occupy the middle range where much of business success is built. The ability to maintain consistent habits, follow up with clients, and execute systematic processes requires this level of emotional stability. Millions are made in the "wash and repeat" cycles that occur at this frequency.

Higher-frequency emotions—joy, creativity, intuition, and happiness—enable us to make genuine impact and build influence through inspiration rather than force. At the highest levels, we find the "world changer" frequencies of peace, serenity, and unconditional love that allow us to set the tone in any environment.

Recognizing that suppressed emotions often manifest as physical symptoms provides another pathway for healing. Emotions stored in different parts of the body can create ongoing health challenges that resolve when the underlying emotional patterns are addressed.

Practical Strategies for Breaking Trauma Bonds

Breaking free from trauma bonds requires both understanding and action. The first step involves recognizing your natural energy cycles. Men typically operate on 24-hour cycles with energy that rises and sets like the sun, while women follow 28-day cycles regardless of their stage of life. Understanding these patterns allows for better timing of important business activities and reduces the likelihood of fighting against your natural rhythms.

Paying attention to moon phases can provide additional guidance, as many women experience higher energy during full moons and more introspective

energy during new moons. Planning presentations, networking events, and launches during high-energy phases while reserving administrative tasks and planning for lower-energy periods can dramatically improve results.

The process of releasing trauma bonds begins with identifying what needs to be healed. Writing out experiences, emotions, and beliefs connected to past wounds helps externalize what has been stored internally. Using voice memos on your phone to talk through difficult experiences provides another pathway for release, as your brain and heart don't distinguish between speaking to a therapist and simply expressing what needs to be said.

The crucial element is releasing rather than storing these expressions. Written processing should be destroyed rather than kept, and voice memos should be deleted rather than sent. The goal is discharge, not communication with others involved in the original wounds.

Cutting energetic cords to past experiences involves a visualization process of removing the "arrows" that others have shot into your heart and cutting the strings that keep you connected to their pain. This process of forgiveness doesn't excuse harmful behavior but rather reclaims your power by refusing to remain emotionally bound to past injuries.

Realigning with Your Vision

The final step in breaking trauma bonds involves realigning with your authentic vision for your life and business. This requires moving beyond theoretical capacity—best-case scenarios that assume optimal conditions—to realistic capacity based on your actual circumstances and energy levels.

Wealth, in all its forms, comes not through special abilities or favorable conditions but through thinking, acting, feeling, and believing in alignment with your vision. Every cell in your body must say "yes" to your desired future, creating the internal coherence necessary for external success.

This alignment process involves regularly connecting with what your successful future would look like, sound like, and feel like, then embodying those qualities in your present actions. Rather than waiting until you achieve

success to act successful, you begin acting as your successful self now, creating the conditions for that reality to manifest.

Surrounding yourself with people who provide hope—mentors, coaches, supportive peers, and clients who believe in your vision—reinforces this alignment. Hope, as it turns out, is not an emotion but a behavior that is modeled and learned through relationship.

Finally, managing allostatic overload—the state when your body has experienced so much stress it doesn't know how to process it—requires intentional reset practices. These include physical resets through breathing, walking, and stretching; mental resets through learning and problem-solving; spiritual resets through meaning-making and connection; emotional resets through expression and release; social resets through connection or healthy disconnection; sensory resets through breaks from electronic devices; and creative resets through recreational activities that restore your spirit.

Breaking trauma bonds is not a one-time event but an ongoing practice of recognizing old patterns, releasing what no longer serves, and realigning with your authentic vision. As you master this process, you'll find that the invisible barriers that once limited your business success begin to dissolve, replaced by a natural flow of energy toward your highest potential.

The journey from trauma-bound limitation to authentic success requires courage, patience, and often support from others who understand the process. Yet the rewards—both personal and professional—far exceed the effort required. When you break free from the unconscious patterns that have held you back, you don't just build a better business; you reclaim your full power to create the life and impact you were meant to have.

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Too Close to the Case: How Authentic Leaders Step Back to Architect Forward by Jennifer Jensen

"The moment you're willing to lose someone's approval is often when you earn their deepest respect. People don't need you to be perfect. They need you to be courageously honest about your imperfections."

The Leadership Myth That's Destroying Organizations

What if everything you've been taught about leadership is backwards? For decades, we've been sold a compelling myth: great leaders are born confident, naturally charismatic, and instinctively know how to inspire others. This narrative has shaped countless leadership development programs, executive searches, and organizational cultures. But here's what the research actually shows, and what brutal journeys through leadership chaos reveal: the leaders who have the greatest impact are those who've been broken, rebuilt themselves, and learned to lead from a place of authentic vulnerability.

The statistics paint a devastating picture of modern leadership failure. Seventy percent of employees don't trust their leaders. The average organization loses \$15.5 million annually due to trust-related issues. Companies with poor leadership experience a 40% higher turnover rate and 67% more burnout among their workforce. These aren't just numbers on a spreadsheet—they represent millions of talented individuals leaving organizations, countless innovations never realized, and immeasurable human potential squandered.

But here's the insight that changes everything: this crisis isn't happening because leaders don't care. It's happening because they don't see themselves clearly. The very success that propels leaders into positions of authority often creates the conditions for their eventual downfall. Success breeds feedback isolation, where people stop telling you the truth precisely when you need it most. The higher you climb, the more insulated you become from the reality of your impact on others.

This chapter explores three counterintuitive truths that will fundamentally shift how you think about influence and impact. First, the moment you're willing to lose someone's approval is often when you earn their deepest

respect. People don't need you to be perfect; they need you to be courageously honest about your imperfections. Second, leaders who try to make themselves indispensable become irrelevant, while those who make others indispensable become irreplaceable. Your legacy isn't what you accomplish—it's what others accomplish because of you. Third, leaders who think they're most self-aware are often the most disconnected from their actual impact. True self-awareness isn't about knowing your strengths; it's about understanding who you become under pressure and learning to choose your response rather than default to your programming.

When Everything Falls Apart: A Personal Journey Through Leadership Chaos

Five years ago, what appeared to be a happy family photo masked a reality where worlds had fundamentally changed and one leader's identity was completely falling apart. The professional landscape had become a minefield of dysfunction: reporting to a hands-off director who provided no structure, navigating around a micromanager who systematically cut off essential business contacts, and protecting a team from a lazy boss who took credit for others' work while contributing nothing of value.

Just as questions about leadership identity reached a crescendo, everything exploded. New leadership swept in with massive egos and even more toxic behaviors. Everything the current company had built was suddenly wrong—the new leaders had done it all better at their previous organization. This left everyone wondering why these leaders had even bothered to join if they held such contempt for their new environment.

Then came the devastating personal blow: a father's terminal cancer diagnosis with only months to live. The world began spinning out of control at breakneck speed. Rock bottom arrived in the form of PTSD from relentless micromanagement, functioning like an automated robot with emotions completely suppressed. The person in the mirror had become unrecognizable. Protective armor had formed at such a high rate that everyone was kept at arm's length. Survival mode meant taking on the role of the family's immovable foundation—the person everyone turned to when things fell apart.

The moment that shattered everything came through a phone call from someone very close: "Jennifer, don't become so disconnected that you lose sight of who you are and stop caring about the people around you." Those words hit like a physical blow, leaving behind both anger and deep unsettlement. The statement carried weight for days, then weeks, turning over in the mind like a puzzle that couldn't be solved.

The revelation struck with crushing clarity: the transformation into someone as cold and unyielding as the rock that had been built for protection. In the determination to handle everything efficiently, the ability to see people around as individuals with their own pain and needs had been lost. The approach had become bulldozing through situations, making decisions without considering that others needed time to process, to feel heard, to be part of the journey rather than just passengers in someone else's plan.

Recognizing this pattern allowed for changed responses and behaviors. But this breakthrough also revealed something deeper that had been avoided: the self. As soon as this was acknowledged, tiny fissures appeared in the armor, and the journey back to discovering authentic identity began—learning how to care for oneself again.

As the rebuilding of sense of self continued, something unexpected happened. The realization emerged that witnessing the full spectrum of leadership—the good, the bad, and the ugly—had created hard-earned lessons that needed to be shared. The most dangerous place for any leader is believing they have it all figured out. Often, the greatest leadership breakthrough comes disguised as the greatest breakdown. The leaders who impact others most are those brave enough to examine their own patterns and choose differently.

Trust: The Currency That Appreciates When You Spend It

The moment that shattered everything previously understood about trust came through a four-month contract opportunity—essentially a trial period to determine organizational fit. Walking into chaos became an understatement. Documents would be signed off, then halfway through projects, the CIO would change direction completely. No mission, no values, no vision guided the work.

The team was drowning in a fear-based environment with massive turnover rates.

The uphill battle involved trying to lead, build trust, and protect the team while fighting against leaders whose own people didn't trust them. When renewal time came, they wanted to extend the contract. The response was to decline. The CIO was stunned: "Why don't you want to renew?"

Here came the moment that changed everything. Looking him directly in the eye, the response was unflinching: "I can't work in an environment where the foundation is constantly changing, where there's no mission, vision, or values, no direction for where the team is going, and where people don't trust you."

Silence filled the room. He was dumbfounded. Leaving that meeting felt like torching both reputation and career. But here's the twist that nobody could have predicted: the CIO called the consulting firm and said, "I can't believe what Jennifer said to me. I've never had anyone say that to my face. Do you think she will come back? I need someone I trust who will be honest with me."

Why did he call back? Because everyone else was lying to him through their silence. They were saying yes when they meant no. They were nodding in meetings and complaining in hallways. He was surrounded by people telling him what he wanted to hear, not what he needed to hear. That experience became a masterclass in what trust truly means: the moment you're willing to lose someone's approval is often the moment you earn their trust.

The Trust Crisis Hidden in Plain Sight

The statistics around trust reveal a crisis hiding in plain sight. Only 32% of employees trust their senior leadership. High-trust organizations are 2.5 times more likely to be high-performing, and the average organization loses \$15.5 million annually due to trust-related issues. But here's the trust blind spot nobody mentions: 85% of leaders believe they're trustworthy, while only 32% of their teams agree. This isn't a trust problem—it's a self-awareness crisis.

The threat becomes more acute the more senior you become: the less trustworthy feedback you receive. Success creates what can be called "feedback isolation." People stop telling you the truth precisely when you need

it most. Your blind spots don't disappear; they just become invisible to you while remaining painfully obvious to everyone else.

But here's the opportunity that changes everything: leaders who can bridge this gap become magnets for talent, information, and opportunity. When people trust you, they bring you their best ideas first. They give you early warning about problems. They fight to be on your team. The shocking truth is that trust isn't built through big moments—research shows it's constructed and destroyed in micro-moments. The split second after someone asks a question, how quickly you respond to emails, whether you remember what someone told you last week—these seemingly insignificant interactions compound into either trust or distrust.

The TRUST Framework: Making Trust Visible

Transparency: The Vulnerability Advantage

Traditional thinking suggests sharing good news while hiding problems. The trust reality reveals that people trust leaders who show them the whole picture, including uncertainty. This means sharing your decision-making process, not just decisions. It means saying "I don't know" when you don't know, then showing how you'll find out. The trust accelerator comes from ending every meeting with "What am I not seeing?" This simple question opens the door for information that would otherwise remain hidden.

Reliability: The Compound Effect

Trust isn't built through grand gestures—it's constructed through consistency and keeping micro-commitments sacred. When you say "I'll get back to you by Friday," that becomes non-negotiable. If you can't deliver, over-communicate why and when you will. The trust multiplier operates on a simple principle: your reliability with small things predicts your credibility with big things. Every kept promise builds your credibility bank account, while every broken commitment creates a withdrawal that's difficult to recover from.

Understanding: The Listening Paradox

People don't need you to have all the answers—they need to know you understand their questions. This requires listening to understand their world, not to formulate your response. The challenge for many leaders is to sit and be

present, reflecting back what you heard before offering solutions. You can build a trust bridge by saying "Help me understand," followed by genuine curiosity. This approach transforms conversations from debates into discoveries.

Support: The Protection Principle

Trust isn't about being liked—it's about people believing you'll protect their interests even when they're not in the room. This means advocating upward for your team's needs, taking responsibility for failures while sharing credit for successes. The trust test becomes: Would my team trust me to represent them in a closed-door meeting? If the answer is anything less than an enthusiastic yes, there's work to be done.

Truth-telling: The Courage Gap

The things you're afraid to say are often the things your team most needs to hear. Delivering difficult feedback is actually a gift, not a punishment. It means addressing the elephant in the room that everyone else tiptoes around. This requires courage because truth-telling often feels risky in the short term, but it builds trust and respect in the long term.

Power: When Letting Go Gives You More

The day that revealed leadership isn't about being indispensable—it's about making yourself strategically unnecessary—came through observing a manager so controlling that her team couldn't speak to anyone above her level without her physical presence. Not a phone call, not an email, not even a casual hallway conversation was permitted. She had positioned herself as the sole gatekeeper to all communication, decisions, and progress, essentially becoming a human bottleneck—the cork in the wine bottle that prevents anything from flowing.

What wasn't understood initially was that she wasn't just controlling—she was terrified. Terrified that if people could go around her, they'd discover she wasn't as valuable as she thought. So she made herself the bottleneck to prove her worth. The results were predictably disastrous: projects stretched from three months to six, vendors couldn't get nine-month-old contracts signed off, and critical business ground to a halt. Not because of technical challenges, but

because one person's fear had created an impenetrable wall around productivity.

The breaking point came with a profound realization: she wasn't protecting her value—she was destroying it. Within a week of her removal, magic happened. Business users called about software they'd requested for three years—a \$6,000 investment that would save \$80,000 annually. Vendors got approvals quickly. Projects that had been stalled for months began accelerating rapidly.

But here's the real revelation: the moment she was gone, everyone else became more valuable, not less. That's when the paradox of true leadership became clear: when you make others successful, you become irreplaceable. When you try to make yourself irreplaceable, you become irrelevant.

The Psychology Behind Control Versus Empowerment

Leaders who hoard control operate from scarcity thinking—they believe others' success diminishes their own. But neuroscience shows this is literally backwards. When we see others succeed because of our influence, our brains release the same dopamine as personal achievement, plus oxytocin, the bonding hormone that creates lasting loyalty. The statistics reveal the cost of this misunderstanding: 70% of micromanagers score high on technical competence but low on leadership effectiveness. Your expertise can become your leadership liability if you can't transfer it to others.

Empowering teams doesn't just perform better—they actually give leaders energy back. Micromanagers report 40% higher stress levels and work 23% longer hours. The energy spent controlling could be redirected toward strategic thinking, relationship building, and innovation. The opportunity cost of micromanagement extends far beyond immediate productivity—it stunts the growth of future leaders and creates organizational fragility.

The SCALE Framework: Systematic Empowerment

Signal Intent Before Action

Before you empower, announce it clearly: "I'm going to start giving you more decision-making authority in X area because I see your potential and I want to

develop it." This creates psychological ownership before responsibility transfer. People rise to the level of trust you place in them, but they need to understand that trust is being placed intentionally.

Create Stretch Assignments, Not Just Tasks

Don't delegate what you don't want to do—delegate what will make individuals grow. Give them your next presentation to a senior leader. Let them run the meeting you usually lead. The goal isn't to offload work; it's to create opportunities for others to develop capabilities they didn't know they had.

Amplify Their Wins Publicly

When they succeed, don't just praise them—amplify it strategically. Tell their story in leadership meetings. Copy their boss on success updates. When you make others famous for their wins, you become known as the leader who creates leaders. This reputation becomes a talent magnet that serves both you and the organization.

Lose Gracefully When They Surpass You

When someone you've empowered exceeds your performance, celebrate it loudly: "This person has taken my approach and made it better. That's exactly what I hoped would happen." The more you lose gracefully, the more you win exponentially. Your success becomes measured not by your individual contribution, but by the collective capability you've created.

Escalate Your Own Focus

As you empower others, you must elevate your own contribution. Move from doing the work to designing the systems. Shift from solving today's problems to preventing tomorrow's challenges. If you're still doing the work you did three years ago, you're not growing—you're stuck. The question becomes: What can only you do at your level that creates the most value for the organization?

The Mirror: Seeing Yourself Clearly in Three Dimensions

Picture walking into work one Monday morning and your boss saying, "Congratulations, you're now accountable for hitting these aggressive

quarterly targets." Then comes the punchline: "Oh, and you have zero authority to make any of the decisions that will determine whether you succeed or fail." This reality felt like being asked to drive a car while someone else controlled the steering wheel.

That impossible situation became the crucible that forged understanding of authentic leadership. The opportunity that wasn't visible initially was that being stripped of positional power forced the development of real influence. Without the luxury of saying "because I said so," mastering the art of influence through relationship became essential. There was no hiding behind a title or position—leadership had to be real or it would crumble completely.

This constraint became the greatest teacher, forcing the development of what can be called leadership self-awareness in three dimensions. The journey revealed understanding of who you are in your comfort zone—confident, collaborative, naturally drawing people in. It illuminated how you show up to the world—the first impression, the energy projected before you even speak.

But the real breakthrough came from discovering who you become under stress. When pressure mounts and deadlines loom, the transformation into what could be called "the fighter" becomes automatic—argumentative, ready to battle through problems rather than navigate around them. Walking into meetings like a boxer ready to enter the ring, fists up, ready to defend positions at all costs.

The realization hit like a cold slap of reality, simultaneously humbling and freeing, because you can't change what you refuse to acknowledge. Everyone has a stress response. Maybe yours isn't "fighter"—maybe you shut down, avoid, people-please, or become hyper-controlling. The specific response doesn't matter. What matters is whether you know what yours is, because if you don't know your stress response, you can't manage it. You just keep defaulting to the same patterns that sabotage your leadership.

The Self-Awareness Crisis in Leadership

Research reveals a shocking truth: only 10-15% of people are truly self-aware. But here's the counterintuitive twist—the more senior you become, the less self-aware you actually get. Why? Because success creates feedback isolation.

People stop telling you the truth. Your blind spots don't disappear; they just become invisible to you while remaining painfully obvious to everyone else.

Understanding the neuroscience behind this phenomenon is crucial: your brain literally changes under stress. Blood flow shifts from your thinking brain to your reactive brain. You're running on instinct, not intelligence. This explains why you say things under pressure that you regret later, why you make decisions when stressed that you would never make when calm.

The opportunity emerges when you understand this is biological, not personal. You can plan for it. You can build in pause moments. You can create systems that prevent you from acting on your worst impulses. This awareness becomes your leadership superpower.

The Three-Dimensional Self-Awareness Framework

Dimension One: At Home - Your Authentic Core

This is who you are when the walls are down and pretense falls away. It's not the polished version you think you should be, but your genuine operating system when you feel completely safe. You make different decisions, express different values, and show up differently when you're truly comfortable versus when you're performing. The key question: What aspects of yourself do you only reveal to those closest to you?

Dimension Two: Your Professional Self - Your Adaptive Persona

This is the version of yourself that you present to the world in professional contexts—meetings, presentations, when meeting new people. It's your strategic adaptation to professional and social contexts. You amplify certain qualities while managing others. It's not fake, but it's intentionally curated for effectiveness and acceptance. The key question: How do you adapt your authentic self for different audiences, and what parts of yourself get edited out in the process?

Dimension Three: Your Stress Self - Your Pressure Patterns

This is who you become when pushed beyond your limits. When deadlines loom, resources are scarce, or stakes feel impossibly high, you switch into

survival mode and default to hardwired patterns that may have served you once but don't serve you now. The key question: What version of yourself emerges under extreme pressure, and how quickly can you recognize when you've shifted into that mode?

This awareness becomes transformational. When you feel that familiar urge of stress-induced reactivity rising—that tightness in your chest, that urge to push back—you can train yourself to take a breath and step back. Instead of charging forward with your agenda, you can pivot into inquiry: "Help me understand your perspective here. What am I missing? How do you see this situation?" This simple shift from fighting to listening transforms not just how you react, but how others respond to you, creating space for collaboration where there used to be conflict, and trust where there used to be tension.

The Integration: Where Leadership Transformation Begins

Leadership isn't about being perfect—it's about being aware, trustworthy, and empowering. It's about growing yourself so you can grow others. It's about becoming the leader who creates other leaders. The questions that matter are: Will you build trust consistently and authentically? Will you have the security to make others great? Will you have the courage to see yourself clearly?

Your leadership journey, fueled by trust, expressed through empowerment, and built on self-awareness, begins with your very next decision. These three elements compound over time in powerful ways. Every act of trust makes the next one easier. Every person you empower makes you more capable of empowering others. Every moment of self-awareness deepens the capacity for the next one.

Six months from now, if you practice these principles consistently, you won't recognize your leadership. Your team won't recognize your leadership. The difference will be that dramatic. The transformation happens not through grand gestures, but through daily choices to see clearly, trust deeply, and empower generously.

The most dangerous place for any leader is believing they have it all figured out. Your greatest leadership breakthrough often comes disguised as your greatest breakdown. The leaders who impact others most are those brave

enough to examine their own patterns and choose differently. This isn't just about becoming a better leader—it's about becoming a leader worth following, worth trusting, and worth emulating.

The mirror reflects not just who you are, but who you're becoming. The question isn't whether you'll face challenges that test your leadership—you will. The question is whether you'll use those challenges to become more authentic, more trustworthy, and more empowering. Your leadership legacy isn't what you accomplish—it's what others accomplish because of you. Right now, someone is waiting for you to believe in them more than they believe in themselves.

Trust is the only leadership currency that appreciates when you spend it. The more you give it away, the more you have. Sometimes the people who risk losing your approval are the only ones you can truly trust—they're not trying to manage you, they're trying to help you. The journey toward authentic leadership begins with the courage to look in the mirror, acknowledge what you see, and decide who you want to become.

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Burnout Isn't the End – It's a Signal to Begin Again by Heather Kidwell

"Burnout isn't a breakdown. It's a whisper from your body, from your spirit and from yourself saying something has to change. You are not broken. You are becoming yourself and gaining new self-awareness and intuition that maybe you didn't have before."

The corner office gleamed in the afternoon sun, its floor-to-ceiling windows offering a panoramic view of the city below. From the outside, it represented everything our culture teaches us to want: success, achievement, recognition. But for Dr. Heather Kidwell, sitting behind that impressive desk ten years ago, the view felt more like a prison than a prize.

She had climbed the corporate ladder in record time, earned the coveted title, and checked every box society had laid out for high achievers. Yet inside, she felt like she was disappearing. The constant travel left her surrounded by people while feeling profoundly alone. She started forgetting things—words, appointments, even parts of herself she had once loved. In quiet moments, she wondered if she was losing her mind.

What Dr. Kidwell didn't know then was that she wasn't broken, wasn't experiencing early-onset dementia, and certainly wasn't alone. She was burned out. And that experience of feeling like "an alien in her own body" would eventually become the foundation for groundbreaking research that reframes burnout not as a personal failure, but as a powerful signal—a whisper from our deepest selves that something fundamental needs to change.

The Language We've Been Missing

In a culture that glorifies exhaustion and confuses achievement with alignment, burnout has become tragically misunderstood. We use the terms stress, overwhelm, and burnout interchangeably, but understanding their distinct differences is crucial for recognizing where we are and what we need.

Stress is simply information—our body's response to pressure or demand. It's usually short-term and can be triggered by both positive and negative events. Think of it as your internal alert system, neither inherently good nor bad, just informational.

Overwhelm occurs when we become overcome by too many stress responses, whether from an abundance of positive experiences or negative pressures. Dr. Kidwell illustrates this beautifully with her experience of six nieces and nephews rushing to hug her simultaneously—pure joy that creates momentary overwhelm simply because of the intensity and volume of stimulation.

Burnout, however, is something entirely different. It's a chronic, physical, emotional, and mental state of exhaustion that develops from prolonged exposure to stressors. Crucially, research shows no documented cases of burnout being triggered by positive stressors. Unlike stress and overwhelm, which can sometimes energize us, burnout represents a systematic shutdown—a slow erosion of our connection to ourselves.

The distinction matters because when we don't have the proper language for what we're experiencing, we can't ask for help. We can't develop appropriate strategies. And we certainly can't recognize burnout as the profound teacher it can become.

Dismantling the Myths That Keep Us Trapped

Before we can transform our relationship with burnout, we must first dismantle the pervasive myths that surround it. These misconceptions don't just misguide our understanding—they actively prevent healing and growth.

Myth #1: Burnout Means Weakness

Perhaps the most damaging myth is that burnout indicates personal weakness or failure. The truth reveals something far different: burnout most often affects the strongest among us. It attacks those who are most passionate, most driven, most willing to push beyond their comfort zones. These very qualities that make someone susceptible to burnout—dedication, passion, high achievement—are strengths, not weaknesses.

Myth #2: A Vacation Will Fix It

While time off can provide temporary relief, burnout requires systemic change, not just rest. Without addressing the underlying misalignment between our energy expenditure and our values, burnout will persist. It might

even follow you on vacation, manifesting as illness just as you're supposed to relax, or preventing you from truly enjoying your time away.

Myth #3: Burnout Is a Personal Problem

Current research increasingly points to burnout as an environmental issue rather than a personal failing. While our individual responses to stress play a role, much of burnout stems from external factors: unclear roles, toxic cultures, lack of autonomy, and systemic pressures. This shift in understanding is crucial—it moves us away from self-blame and toward meaningful change.

Myth #4: Burnout Only Happens at Work

Burnout can occur anywhere we experience chronic stress and misalignment. Caregiving, parenting, even self-improvement efforts can lead to burnout if we consistently push beyond our capacity without adequate recovery and realignment.

The Cultural Programming Behind Our Exhaustion

To understand how burnout has become so prevalent, we must examine the cultural programming that glorifies exhaustion. The early 2000s, with the rise of internet connectivity and accelerated communication, gave birth to what we now recognize as hustle culture. The 2010s amplified this with "girl boss" energy and the rise of performative productivity.

These weren't just trends—they became identity markers. We learned to wear exhaustion like a badge of honor, to compete over who worked the longest hours, who sacrificed the most for their goals. Phrases like "pull yourself up by your bootstraps," "no pain, no gain," and "sleep when you're dead" became more than motivational slogans—they became maladaptive survival strategies.

This cultural programming taught us to swim underwater, holding our breath, hoping for the next pocket of air rather than learning to surface and breathe regularly. We learned to compare our stress levels, as if suffering were a competition. We developed the belief that stress must be catastrophic to truly count, invalidating our own experiences if they seemed "less bad" than others'.

But here's what Dr. Kidwell's research makes clear: stress is not a competition. Burnout is not a competition. Whatever feels like stress to you is valid stress for you. Choosing rest, choosing joy, choosing yourself—while it might feel foreign given our cultural programming—is not selfish. It's strategic.

The Sneaky Nature of Burnout

One of burnout's most insidious qualities is how it announces itself—or rather, how it doesn't. Burnout is invisible until it becomes undeniable. It creeps up quietly, like a "sneaky little booger" that suddenly jumps out and says, "Surprise! You're burned out!"

This stealth quality means that even with frameworks and warning signs, many people still don't see burnout coming. Dr. Kidwell emphasizes the importance of releasing self-judgment around this reality. The invisibility of burnout's approach is part of its nature, not a reflection of our awareness or intelligence.

Understanding this can be liberating. If you've experienced burnout and wondered why you didn't see it coming, you're not alone. The gradual erosion that characterizes burnout often happens below our conscious awareness until it reaches a tipping point.

Burnout as a Call Home to Yourself

Here's where the transformation begins: what if burnout isn't the enemy we've been taught to see it as? What if it's actually a sophisticated guidance system, calling us back to ourselves?

Research consistently shows that burnout stems from a fundamental misalignment between how we spend our energy and what we truly value. When Dr. Kidwell pursued her doctorate—an incredibly stressful endeavor—she didn't experience burnout because the work aligned with her values and sense of purpose. The stress was significant, but it was stress in service of something meaningful to her.

Most of us, however, find ourselves pouring energy into things that don't reflect what matters most to us. This isn't inherently wrong or bad—it's

simply information. It's our inner guidance system saying, "This path isn't serving your deepest self."

This reframe is revolutionary. Instead of seeing burnout as a breakdown, we can recognize it as a breakthrough invitation. It's our psyche's way of saying, "The life you're living doesn't match who you really are. It's time to come home to yourself."

The BEAM Framework: A Path Forward

Through her doctoral research, Dr. Kidwell discovered something troubling: while there was extensive research on what burnout is and what it does to us, there were remarkably few evidence-based tools for recovery and prevention. This gap led her to develop the BEAM framework—a simple but powerful tool grounded in neuroscience, spirituality, and humanity.

B - Breathe

This is the pause, the moment of checking in with your body. Just as you might assess symptoms when you have a fever, this step involves asking: What is my body telling me right now? What signals am I receiving? This isn't about fancy breathwork or meditation techniques—it's simply about taking one conscious breath and listening.

E - Explore

With awareness comes the opportunity to explore. What values have you been neglecting? What would bring you joy in this moment? What do you notice about your current situation? This exploration requires some foundational work—knowing your values, understanding what energizes versus drains you, recognizing your patterns.

A - Align

This step involves aligning with yourself, not with what you "should" do or what others expect. It's about making choices that honor your values and bring you back to yourself. This might mean saying no to a commitment that doesn't serve you, or yes to something that lights you up.

M - Move

Move means taking action—one step toward being aligned with yourself. This doesn't necessarily mean physical movement (though it can). It means taking concrete action, however small, toward the alignment you've identified. Sometimes this might be as simple as mindful breathing; other times it might involve larger life changes.

The BEAM framework assumes you know your values, understand what brings you joy, and have clarity about your purpose. For many people, this foundational work represents weeks or months of exploration. The framework is simple in concept but requires depth of self-knowledge to implement effectively.

The Power of Micro-Interventions

For those moments when you don't have time for deep value exploration or major life changes, micro-interventions can provide immediate relief and reset your nervous system. Research shows that breaks as short as five to ten seconds can have meaningful impact by activating the parasympathetic nervous system and releasing beneficial neurochemicals.

The sweet spot appears to be two to ten minutes, which can reduce fatigue by 35%, boost vigor, and improve emotional regulation. Three evidence-based micro-interventions stand out:

Movement and Breathwork

As little as three minutes of movement or conscious breathing can completely reset your nervous system. This can be as simple as taking the long way to refill your water, playing with your children, or doing basic stretches at your desk. The key is changing your physical state, even briefly.

Creative Engagement

Harnessing creativity—through art, music, dance, or even building with Legos—triggers a sense of safety in the brain. The theory suggests that when our ancestors had time to appreciate something from a creative perspective, it meant they weren't being chased by predators or struggling for survival. While 45 minutes of creative activity shows the most significant cortisol reduction, even brief creative moments can be beneficial.

Nature Connection

Birdsong and water sounds specifically activate our parasympathetic nervous system within four minutes. If you can't access actual nature, audio recordings of these sounds can still provide benefits, though not as powerfully as the real thing. Even looking at images of nature or listening to nature sounds while stuck indoors can offer some relief.

Redefining Recovery and Resilience

Recovery from burnout isn't just about rest—it's about reconnection. It's about remembering who you were before you learned to edit your self-expression to fit societal expectations. Dr. Kidwell often asks clients to remember what their five-year-old self loved most. This isn't a frivolous exercise; it's a pathway back to authentic self-expression.

We begin editing our natural self-expression around age eight or nine, and this editing intensifies as we navigate various systems—family, school, work, society. Our brains are naturally conformative; they learn to adapt so we can survive and fit in. But here's the hopeful truth: up to 40% of our adult personality traits remain malleable. The parts of yourself that feel lost aren't gone—they're simply waiting to be invited back.

This reconnection work is deeply personal. We don't all have the same "plug" or "battery life." Some of us are USB-A, others USB-C, others something entirely different. Understanding your unique charging system—what truly restores and energizes you—is crucial for sustainable well-being.

The Ripple Effects of Transformation

When Dr. Kidwell learned to recognize her triggers and symptoms, when she developed strategies aligned with her authentic self, something remarkable happened: she no longer started vacations sick. Her body no longer needed to wait for permission to release accumulated stress hormones.

This transformation rippled through every area of her life. Burnout doesn't just affect the person experiencing it—it impacts every relationship, every room you enter, every decision you make. Similarly, healing from burnout and realigning with your authentic self creates positive ripples that extend far beyond your individual experience.

Your Journey Forward: The Kayak Metaphor

Imagine your life journey as sitting in a kayak floating in the ocean. You cannot control the waves, the weather, or the external conditions. But you can paddle a little more on the left or right to stay aligned with where you're headed. And where you're headed, ideally, is toward joy, purpose, and energy alignment with what truly drives you.

This is the essence of the BEAM framework and the broader transformation that burnout can catalyze. It's not about being rigid; it's about being responsive. It's about developing the self-awareness to recognize when you're drifting off course and the tools to gently guide yourself back to alignment.

The Invitation: One Breath, One Value, One Shift

The path forward doesn't require massive, overwhelming changes. It begins with the smallest possible steps: Take one breath. Name one value you've been neglecting. Make one tiny shift this week to honor that value.

If you're currently experiencing burnout or have in the past, hear this clearly: burnout is not the end of your story. It's the beginning of a more honest story. It's not a liability—it's a signal, a resource, and a mirror. You are not broken. You are becoming.

The invitation is to see burnout not as something that happened to you, but as a sophisticated guidance system leading you back to yourself. In a world that often demands we abandon our authentic selves for external validation, burnout can be the wake-up call that saves us from a life of beautiful but hollow achievements.

The storm of burnout may flatten everything in its path, but when the sun breaks through the clouds and you feel that first beam of light on your face, you'll know: the storm has passed, and now the real work of rebuilding—authentically, intentionally, aligned with your deepest self—can begin.

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Is Your Strategy a Spy? What Smart Leaders Can Learn from Smart Devices by

Chris Carter

"AI is not going to take away your job, it's just going to make you a better employee that's going to be more of a benefit to the companies you work for."

The year was 1985, and while most high school students were focused on Friday night football games and weekend parties, Christopher Carter was falling in love with something that would define his entire career trajectory. It wasn't a person or a hobby—it was a white box called the Commodore VIC-20, complete with a cassette recorder attachment that would change everything.

"I used to steal my girlfriend's love tapes that she would make me with all these beautiful songs recorded off the radio," Carter recalls with a laugh. "And I would run code in there. My first program was little seagulls flying across the screen. From that point, I was addicted."

That addiction to technology would eventually transform Carter from a curious teenager tinkering in his bedroom to the CEO and founder of AppRoyal, a global SAP and cloud solutions company serving clients across 30 countries. With over 170 employees and recognition as the second-largest SAP company behind Microsoft, Carter's journey exemplifies the American entrepreneurial dream—but with a distinctly modern twist involving artificial intelligence, cybersecurity, and the complex challenges of our hyper-connected world.

The Foundation: Building an American-First Technology Company

When Carter founded AppRoyal in 2011, he made a deliberate choice that would define his company's culture and approach. Operating from the renovated joisted attic of his 1918 home, he established what he calls an "America-first philosophy" for serving American companies.

"I didn't want to bring in everybody from overseas like every other company seemed to be doing at the time," Carter explains. "They were bringing in everybody from India and trying to lowball price points. I said, no, we're not going to do that. We started in the office, and lo and behold, it took off. People

wanted to be able to have great conversations with great people with great knowledge."

This decision wasn't born from isolationism but from a strategic understanding of what clients truly valued. Carter recognized that while cost-cutting through offshore labor was the industry norm, there was an underserved market hungry for high-quality, accessible communication and deep expertise. His bet on American talent, supported by SAP's robust college education programs, proved prescient.

The company's structure reflects this philosophy while maintaining global reach. Carter operates offices in Europe, Asia, and Brazil to follow the sun and serve clients across time zones, but the core operations remain rooted in American values and workforce development. "I don't need to bring them here to the United States to do any of that work," he notes, describing a model that leverages global presence without compromising his foundational principles.

From that renovated attic, Carter has grown, sold, folded, and rebuilt multiple entities within the SAP ecosystem. Each iteration taught him valuable lessons about guiding people, staff, and companies toward better outcomes in an increasingly complex technological landscape.

The SAP Advantage: Creating a Single Source of Truth

To understand Carter's success, it's essential to grasp what SAP brings to modern businesses. As Carter explains it, SAP serves as the central nervous system for enterprise operations, consolidating everything from financial management to human resources, warehouse operations, and shipping into one unified platform.

"It literally puts all of your applications, no matter if it's your financials like QuickBooks or whatever, your HR, your warehouse, shipping—anything that you have to do from a business—it puts it all in one nice neat ball and keeps it there," Carter describes. "So you have one database of truth."

This concept of a "single source of truth" becomes even more critical in the age of artificial intelligence. As companies rush to implement AI solutions, the quality and consistency of their underlying data determines success or failure.

Carter emphasizes that businesses need clean, consolidated data to make AI work effectively for their specific operations, rather than relying on external data that might skew results or compromise proprietary insights.

The timing couldn't be better for AppRoyal's expertise. Carter notes that the industry is experiencing "the largest upgrade cycle in history," creating unprecedented demand for skilled SAP professionals. This surge presents both the company's greatest opportunity and its most significant challenge—finding enough qualified people to meet client needs.

"Our biggest threat is not enough people in the SAP ecosystem that we can bring into the organization to help our customers and who want to grow with us," Carter admits. "We need more people desperately."

Beyond the Office: Overwatch and the Internet of Things Revolution

Carter's entrepreneurial vision extends beyond traditional enterprise software into the rapidly expanding world of Internet of Things (IoT) security. His company Overwatch addresses a critical vulnerability that most consumers never consider: the security of their connected devices.

"Remember when we talked about Roombas and ring doorbells and your refrigerator—anything that's connected to the internet?" Carter asks. "Overwatch can monitor, manage, and support everything across that line that's connected into your Netgear or whatever hub you're using at your house."

The problem is both simple and terrifying. Most consumers install connected devices using default passwords, creating massive security vulnerabilities. Carter references the classic comedy "Spaceballs" to illustrate the point: "His same luggage code, one, two, three, four, is the same thing that Netgear put on there."

The implications extend far beyond inconvenience. Carter recounts appearing on Newsmax TV to discuss a particularly disturbing case: "A baby monitor got hacked by a bad actor, and that baby monitor was being watched by individuals in some other country monitoring everything going on in that

room, including the baby, the husband, the wife, and others going into that room."

This vulnerability exists because manufacturers prioritize ease of installation over security, shipping devices with universal default passwords. When consumers fail to change these credentials, they create entry points for malicious actors who can access not just the devices themselves, but potentially the entire home network and any sensitive information stored on connected computers.

The Convenience Trap: How Modern Life Creates Security Vulnerabilities

Carter identifies a fundamental tension in modern technology adoption: our love of convenience often conflicts with security best practices. This trade-off manifests in countless daily decisions, from the apps we download to the passwords we choose to the devices we connect to our home networks.

"The perfect example is TikTok," Carter observes. "Everybody wants the easy application that is fun to play with and be able to do all this stuff. Look, I get it. Kids just want to be kids. Adults want to play on it. They think it's fun. But all that data is going to China."

The data collection extends far beyond social media platforms. Every connected device, every app download, every online interaction contributes to detailed profiles that companies—and potentially malicious actors—can exploit. Carter notes that the world economy now runs on two primary commodities: gold and data. Companies with the most comprehensive data collections—Apple, Google, the Chinese government, and the U.S. government—wield enormous power and influence.

This reality creates particular vulnerability for older adults, who may be less familiar with technology security practices. Carter describes these individuals as targets for "vultures" who prey on their trust and limited technical knowledge. "These scumbags prey on older individuals. They are just evil people because they know that you get an 89-year-old woman on a phone and pretend to be her bank."

The solution requires both individual awareness and systemic change. Carter advocates for longer, more complex passwords (minimum 12 characters combining letters, numbers, and symbols), regular security updates, and careful vetting of apps before installation. He also calls for manufacturers and service providers to do more to educate consumers about security best practices.

The AI Revolution: Tools for Enhancement, Not Replacement

While many fear artificial intelligence as a job-destroying force, Carter presents a more nuanced and optimistic perspective. He views AI as a powerful enhancement tool that can make workers more valuable rather than obsolete.

"AI is not going to take away your job," Carter emphasizes. "It's just going to make you a better employee that's going to be more of a benefit to the companies you work for."

The key lies in understanding that different AI tools serve different purposes. Carter distinguishes between consumer-facing generative AI platforms like Canva and Suno for creative work, and enterprise-focused AI systems that analyze proprietary business data. For companies, the goal should be leveraging AI to gain insights from their own information rather than allowing external data to influence or compromise their unique competitive advantages.

This approach requires careful tool selection and implementation. Carter stresses the importance of choosing "the right tool for the right project with the right amount of data, with the right activity, with the right people." Companies must also satisfy increasingly demanding executives who expect clear return on investment from AI initiatives.

The integration of AI with SAP systems creates particularly powerful opportunities. By applying AI analysis to the comprehensive, clean data that SAP platforms provide, companies can gain unprecedented insights into their operations, customer behavior, and market opportunities.

Personal Philosophy: Rocky Balboa and Salvador Dalí

Carter's office décor reveals the philosophical foundations that drive his success. A framed quote from Rocky Balboa reminds him daily that "life is going to continuously knock you down and you've got to get up and you're going to keep moving forward." This isn't just motivational decoration—it reflects Carter's deep appreciation for Sylvester Stallone's journey from struggling writer to Hollywood icon.

"Stallone had sold that script for \$10,000 to ABC television, and they were not going to allow him to be a part of it," Carter recounts. "He got Henry Winkler to bring it back. He gave back the check and pitched it to everybody and said, 'Nope, I have to be Rocky. It's my life. It's my dream. Nobody's going to play this better than I am.'"

This story resonates with Carter's own entrepreneurial journey—the willingness to bet on himself, to maintain control of his vision, and to persist through challenges. Like Stallone, Carter has experienced setbacks, including neck surgeries and business difficulties, but has consistently "kept getting up, kept moving forward, kept striving to be better every day."

The Salvador Dalí print represents another facet of Carter's philosophy. Dalí's eclectic, boundary-pushing artistry appeals to Carter's appreciation for creative thinking and unconventional approaches. In an industry often dominated by rigid technical specifications, Carter values the kind of innovative, outside-the-box thinking that Dalí embodied.

The Unexpected Side Venture: Carter's Pub

Perhaps nothing illustrates Carter's diverse interests and entrepreneurial spirit better than his ownership of Carter's Pub in northern Wisconsin, complete with 100 bottles of bourbon and what he claims are the county's best cheese curds. This seemingly incongruous addition to his business portfolio actually makes perfect sense when viewed through the lens of his core philosophy: building genuine relationships and creating value for communities.

"I'm either there or I'm on Delta, depending upon my day of the week," Carter jokes, highlighting the balance between his global technology consulting

work and his local community investment. The pub represents more than a business venture—it's a physical manifestation of his commitment to American communities and values.

On National Cheese Curd Day, Carter's pub gives away free cheese curds to customers who purchase a meal and beverage, embodying the same customer-first philosophy that drives AppRoyal's success. Whether he's helping a Fortune 500 company optimize their SAP implementation or serving cheese curds in Wisconsin, Carter focuses on creating positive experiences and genuine value.

Knowledge Sharing: Seventeen Books and Counting

Carter's commitment to education extends beyond his client work into prolific writing. He has authored 17 books, including four bestselling "Mastering SAP" titles, all of which he gives away for free. These books, ranging from 90 to 150 pages, provide foundational knowledge in SAP, AI, cloud computing, and cybersecurity.

"It gives me the ability to help people," Carter explains. "At the end of the day, I want to be able to help more individuals in their AI, their SAP, their cloud, their cybersecurity. Each one of those talks about that in detail and gives them the baseline that they need. It literally builds the basement of the house so the big bad wolf can't blow it down."

This educational mission reflects Carter's understanding that the technology industry's success depends on developing a broader base of knowledgeable professionals. By freely sharing expertise, he contributes to the ecosystem that supports his business while helping individuals advance their careers and companies improve their operations.

The books also serve a strategic purpose for AppRoyal. In an industry where trust and expertise are paramount, Carter's published works establish credibility and demonstrate depth of knowledge. Potential clients can evaluate his thinking and approach before engaging his services, creating a more informed and confident decision-making process.

Looking Forward: Challenges and Opportunities

As Carter assesses his company's current position using a SWOT analysis framework, the picture that emerges is one of tremendous opportunity constrained by talent availability. AppRoyal's greatest strength—its experienced, capable team—also highlights its primary limitation: the need for more skilled professionals in an industry experiencing unprecedented growth.

"There's not enough hours in the day for us to do the things that we want to do to accomplish," Carter admits, identifying time and talent as both his biggest weakness and greatest opportunity. The company's challenge lies not in finding work or maintaining quality, but in scaling to meet demand during what Carter describes as "the largest upgrade cycle in history."

This constraint points to broader industry trends that favor companies like AppRoyal. As businesses increasingly recognize the strategic importance of data integration, AI implementation, and cybersecurity, demand for expert guidance will only grow. The companies that can attract, develop, and retain top talent will capture disproportionate value in this expanding market.

Carter's solution involves working with educational institutions to develop more SAP-focused curricula. While prestigious universities like his alma mater Georgia Tech focus on cutting-edge research in AI and quantum computing, Carter advocates for more practical, industry-specific training programs. "I wish they did more with SAP," he notes, highlighting the gap between academic computer science education and market demand for specific enterprise skills.

The Broader Message: Success Through Service

Throughout Carter's journey from basement startup to global enterprise, one theme remains constant: success comes from genuinely serving others. Whether helping companies optimize their operations, educating professionals through his books, protecting families through cybersecurity solutions, or simply serving great cheese curds in Wisconsin, Carter focuses on creating real value for real people.

This service-oriented approach has built sustainable competitive advantages that transcend economic cycles and industry disruptions. Clients stay with AppRoyal not just because of technical competence, but because of the relationship quality and genuine care that Carter and his team provide. In an increasingly automated world, this human element becomes more valuable, not less.

Carter's story also illustrates the continued vitality of American entrepreneurship in the global technology sector. By maintaining his America-first philosophy while serving international clients, he has created a model that leverages global opportunities while supporting domestic communities and workforce development.

As artificial intelligence, cybersecurity, and enterprise software continue evolving, Carter's companies are positioned to help organizations navigate these changes successfully. His combination of deep technical expertise, educational mission, and genuine service orientation provides a template for building sustainable, impactful businesses in the digital age.

The boy who fell in love with making seagulls fly across a computer screen has built something far more significant: a company that helps other organizations soar while keeping their feet firmly planted on secure ground. In an era of rapid technological change and increasing digital vulnerability, that combination of innovation and security, ambition and stability, represents exactly what businesses and communities need to thrive.

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Operations that Stick: Turning Weaknesses into Scalable Systems by LLance

Kezner

"If you listen to a lot of the food startup business histories, there's a lot of trial and error. Partners, companies go out of business. You have no control over that. But the thing is, is that we would have never created a new category like this if we were an insider in the food business because you're kind of bound by what someone else has done."

From Kitchen Experiment to Walmart Shelves: Creating a New Food Category Through Persistence and Innovation

The aroma of tomato basil fills the air as LLance carefully demonstrates the "schmush" technique—pressing a teabag against the side of a cup to extract maximum flavor. But this isn't just any teabag. It's a revolutionary product that transformed a simple classroom snack into a multimillion-dollar business now sold in over 3,000 stores nationwide, including Walmart and Sam's Club.

The story of Millie's Sipping Broth begins with a question that has sparked countless innovations: "Why didn't I think of that?" For LLance and his wife Lori, they were the ones who did think of it—and more importantly, they acted on it.

The Birth of an Idea: A Teacher's Simple Need

Picture this: 24 rambunctious kindergarten students, the chaos of a classroom, and a dedicated teacher who wanted to maintain her energy throughout the day without succumbing to the temptation of leftover cakes and cookies in the teacher's lounge. This was Lori's daily reality.

As a school teacher, Lori took pride in her work and wanted to be at her best for her students. During breaks, while other teachers gravitated toward the sugar-laden treats that inevitably appeared in the break room, Lori had developed her own strategy. She would bring bouillon cubes to school, mixing them with hot water to create a savory snack that would satisfy her hunger without derailing her healthy eating goals.

LLance, observing his wife's routine, noticed something concerning. "That's a lot of sodium, a lot of crap in there," he told her. "Why don't I try and make something healthier for you?"

What started as a husband's concern for his wife's health became the foundation of a food revolution. LLance began experimenting in their kitchen, combining dehydrated vegetables and herb seasonings to create a healthier alternative. His first attempt was promising—the flavor was excellent—but there was a practical problem.

"It's all loose and floating around," Lori observed after trying his homemade concoction. Then came the suggestion that would change everything: "Why don't you put it into a teabag?"

The solution was elegantly simple, yet it required some creative problem-solving. Together, they took Lipton tea bags, carefully opened them, removed the tea, and filled them with LLance's vegetable and herb mixture. Then they stapled them back together—a far cry from the sophisticated manufacturing process they would eventually develop.

Lori took ten of these homemade broth bags to school and placed them in the teacher's break room. When she returned from class, they were all gone. The excitement in her voice when she shared this news with LLance was palpable. "I think we have something here," LLance realized. "I think there's something here."

That simple moment of validation—teachers choosing their product over conventional snacks—marked the beginning of a 14-year journey, starting in 2011, that would take them from their kitchen to the world's largest retailer.

The Long Road to Manufacturing: Six Years of Trial and Error

The concept seemed straightforward: broth in a teabag. How difficult could it be to manufacture? The answer, as LLance and Lori would discover, was extremely difficult. What appeared to be a simple idea would take six years to perfect at any meaningful scale.

"When we created the first idea of broth in a teabag, super simple idea, we didn't realize that it was going to take six years for us to get the manufacturing

and formulation right. It was super, incredibly difficult to manufacture at any kind of scale," LLance recalls.

The early days were manageable when they were hand-making small quantities in their kitchen. But as they began to envision bringing their product to market, the challenges multiplied exponentially. The delicate balance of ingredients that worked perfectly in small batches became problematic when scaled up. The teabag material had to be strong enough to hold the ingredients but porous enough to allow proper steeping. The filling process required precision to ensure consistent flavor and prevent breakage.

Their first real-world testing ground became the Pike Place Market in Seattle, where they set up a booth across the street from the original Starbucks. Weekend after weekend, they would present their product to thousands of potential customers, refining their pitch and learning valuable lessons about consumer behavior.

"One of the things that I tell people about getting a new product out is to bring it to people as quickly as possible because you learn all kinds of things," LLance explains. "You learn about what makes people buy, who needs to buy. You learn about your packaging. You learn about your price. You learn about yourself and how you present it and how you sell it."

This direct customer interaction forced them to distill their message to its essence. They had mere seconds to capture someone's attention and explain their product. Through thousands of repetitions, they honed their presentation skills and gained deep insights into consumer psychology.

But the real challenge lay in finding a manufacturing partner who could produce their product at scale while maintaining quality. This search would prove to be one of their most frustrating and educational experiences.

The Partnership Puzzle: Finding the Right Co-Packer

LLance and Lori quickly realized that their kitchen-based operation wouldn't scale to meet growing demand. They needed to find a co-packer—a company that specializes in manufacturing products for other brands. What seemed like

a straightforward business arrangement turned into a years-long odyssey through four different manufacturing partners.

"We went through four different companies to find the right partner. Each time we learned who we should be dealing with, how to deal with these partners, what is a good partner," LLance recounts.

The first partner seemed promising initially. They assured LLance and Lori that they could absolutely manufacture the product. However, when the couple arrived to pick up their first order, they found broken bags scattered everywhere. The manufacturing process had been too rough for the delicate teabags, resulting in a significant portion of the inventory being unusable.

The second attempt brought a different problem: quality control. This manufacturer managed to keep the bags intact but burned the ingredients during processing. The carefully balanced flavors that LLance had developed were destroyed by excessive heat, leaving customers with an unpalatable product.

The third partnership collapsed due to financial miscalculations. The manufacturer had underestimated their costs and was losing money on every unit produced. When LLance and Lori returned to place their next order—with confirmed customers waiting for the product—they were told the company would no longer make their product.

Each setback was devastating, particularly when they had customers expecting deliveries. But these failures taught them valuable lessons about partner selection, contract negotiation, and the importance of backup plans.

"The reason why we chose to work with co-packers is because we're not experts in manufacturing food. We want to tap into the expertise of other people to make our food because they can scale it faster. They have the equipment, they have all that kind of stuff. We want to focus on the innovation. We want to focus on the marketing of the product."

This philosophy—focusing on their core competencies while partnering for specialized expertise—would eventually serve them well. But first, they had to survive the learning curve.

The Power of Persistence: Defining Personal Goals

What kept LLance and Lori going through years of manufacturing setbacks, financial strain, and moments of doubt? The answer lies in their fundamental approach to goal-setting and their long-term vision for their business.

"The only thing that got us through was our personal goals. I think the key is to have really simple, fundamental goals that you can live with for 10 or 15 years when it comes to creating something like this. Because if you have unrealistic goals that are short-term, it's just not going to work."

Their goals were refreshingly straightforward: create a sustainable family business that could serve as a legacy for their two sons. This wasn't about getting rich quick or achieving viral success. It was about building something meaningful and lasting.

Both LLance and Lori continued working their day jobs—he in software sales, she as a teacher—while building their business. This dual commitment meant extremely long days and complex time management challenges, but it also provided financial stability during the uncertain early years.

They involved their sons in the business from the beginning, making them work at the Pike Place Market booth alongside their parents. This hands-on experience taught the boys about entrepreneurship, customer service, and the value of hard work while reinforcing the family nature of the enterprise.

The food industry, LLance learned, is not typically a place for overnight success stories. While there are occasional superstars who achieve rapid growth, the more common path involves steady, persistent effort over many years.

"In the food business there are superstars right, there's the companies that go from zero to a million in three years. Very infrequent, doesn't happen. But what we've been able to do is have a very slow, steady growth."

This realistic perspective helped them weather the inevitable setbacks and maintain focus on long-term objectives rather than getting discouraged by short-term obstacles.

Creating a New Category: The Challenge of Consumer Education

One of the most significant challenges LLance and Lori faced was definitional: What exactly were they selling? The product didn't fit neatly into existing categories, which created both opportunities and obstacles.

Initially, they positioned themselves as a "savory tea" company. The logic seemed sound—they were using teabags and hot water steeping, so why not tea? But consumers couldn't make the connection. Tea, in their minds, was sweet or herbal, not savory. The concept of savory tea was too foreign to gain traction.

"Originally we considered ourselves a savory tea, but people just didn't understand that concept. They just couldn't connect the two things together. Tea is tea. Savory is not tea."

The solution came from an unexpected source: competition. Six months after Millie's launched, a larger competitor introduced their own version of broth in teabags. They copied Millie's flavors and immediately secured placement in Whole Foods—a distribution win that had eluded the original innovators.

Initially, this seemed like a devastating blow. How could a small startup compete with a well-funded competitor that had instant access to premium retail locations?

But the competitor made a crucial mistake. In their rush to market, they had reverse-engineered Millie's product but left out key ingredients that made it taste good. The result was a product that, as LLance puts it, "tasted like boiled vegetable water" rather than "a comforting cup of broth that made you feel good."

Consumer reaction was swift and harsh. The competitor's product failed quickly, but their failure provided valuable market education. It clarified what consumers expected from this new category and forced LLance and Lori to refine their positioning.

They rebranded from "Millie's Savory Teas" to "Millie's Sipping Broth," embracing the broth identity rather than trying to fit into the tea category. This positioning made immediate sense to consumers. People had been

drinking broth for thousands of years for comfort, nutrition, and healing. Millie's was simply making it more convenient.

"We created a new idea, but we have been drinking broth for thousands and thousands of years. It's a fundamental thing in people's health recovery and everything like that. We just made it way more convenient."

The COVID Breakthrough: From Specialty Product to National Brand

The year 2020 brought unprecedented challenges to businesses worldwide, but for Millie's Sipping Broth, it became a period of explosive growth and opportunity. The pandemic created conditions that were perfectly suited to their product's benefits and convenience.

The breakthrough came through Weight Watchers. During lockdowns, as people struggled with weight management and healthy eating habits while stuck at home, Weight Watchers discovered Millie's Sipping Broth. The product's low calorie count, satisfying nature, and convenience made it ideal for people trying to avoid snacking on unhealthy foods.

Weight Watchers featured Millie's on the front page of their website, instantly exposing the product to millions of potential customers. This endorsement created a cascading effect—the product became the best-selling vegetable broth on Amazon almost simultaneously.

"We went from selling direct to people on our website, we had a couple of specialty shops that sold some tea shops, to all of a sudden getting a national awareness."

But success brought its own challenges. The sudden spike in demand pushed their manufacturing capabilities to the breaking point. During a time when supply chains were disrupted globally, they needed to source ingredients, secure packaging, and scale production dramatically.

The pandemic had created shortages of everything from raw materials to packaging materials. Companies were laying off workers, reducing production capacity, and prioritizing existing large customers over smaller ones. LLance and Lori found themselves in the paradoxical situation of having more

demand than they had ever experienced while facing the most constrained supply situation they had ever encountered.

"On one hand we had this incredible demand and opportunity. And on the other hand, we had these constraints. And we just went through it. We figured out ways to keep it going."

Their approach during this crisis was refreshingly straightforward: they didn't make excuses, they just worked harder. When there were delays, they apologized to customers and promised to make it right. When ingredients were hard to find, they searched for alternatives or waited for availability. When packaging was delayed, they found workarounds.

Most customers were understanding, recognizing that everyone was facing unprecedented challenges. The few who weren't understanding were simply part of doing business. LLance and Lori focused on what they could control and accepted what they couldn't.

This period of intense pressure proved to be invaluable preparation for what came next. The experience of managing extreme demand with constrained resources built their confidence and operational capabilities. They learned they could handle much larger volumes than they had previously imagined.

The Walmart Moment: Scaling to 3,000 Stores

The opportunity that would transform Millie's from a regional specialty product to a national brand came through Walmart's Open Call program. This initiative invites small businesses to present their products for potential inclusion in Walmart stores—a chance to reach millions of customers through the world's largest retailer.

The numbers were daunting: 7,000 products applied for the program, 700 were accepted to present, and only 70 would ultimately be invited to place their products in stores. Millie's Sipping Broth was selected as one of the 70.

But being selected was just the beginning. Walmart didn't just want the product in a few test stores—they wanted it in 3,000 locations. They also wanted it in Sam's Club locations simultaneously. This meant LLance and Lori

needed to produce more product in one week than they had manufactured in an entire previous year.

"We went from this level that we could handle to this extreme level."

The scaling challenges were immense, but their experience during the COVID surge had prepared them for rapid expansion. They had learned how to work with their manufacturing partners under pressure, how to source ingredients quickly, and how to manage inventory across multiple channels.

Even so, there were limitations. Walmart wanted them in 3,000 stores, but they could only manage 2,000 initially. Sam's Club wanted them in every location, but they could only supply 400 stores. Rather than seeing these as failures, LLance and Lori viewed them as successful launches with room for growth.

The key was honest communication. They told Walmart and Sam's Club exactly what they could deliver and then exceeded those commitments. This approach built trust and set the foundation for a sustainable partnership.

Nearly two years later, both retailers have kept Millie's Sipping Broth on their shelves—a clear indication that the product is meeting sales expectations and customer satisfaction goals. For LLance and Lori, seeing their product on Walmart shelves remains a surreal experience, a tangible reminder of how far they've traveled from their kitchen experiments.

Understanding Your True Customer: The Need-to-Have Discovery

One of the most important lessons LLance and Lori learned was the difference between who they thought would buy their product and who actually needed it. This distinction between nice-to-have, want-to-have, and need-to-have customers proved crucial to their marketing and business development strategies.

"You really have to think about your customers in this way: there's nice-to-have people that would be nice to have your product, people who want to have your product, and people who need to have your product. The key difference between each of these is the frequency of use, the cost sensitivity, and who's going to be willing to try it."

Initially, they assumed their primary customers would be health-conscious consumers looking for convenient, nutritious snacks. While this group did purchase the product, they weren't the most loyal or frequent users.

The need-to-have customers revealed themselves through usage patterns and feedback. These were people dealing with specific challenges where Millie's Sipping Broth provided genuine solutions:

People trying to manage cravings and avoid unhealthy snacking found that the savory, satisfying nature of the broth helped them stay on track with their dietary goals. Unlike sweet snacks that could trigger more cravings, the broth provided satiation without blood sugar spikes.

Patients recovering from surgery discovered that the gentle, nutritious broth was easier to consume than solid foods while still providing comfort and nourishment. The convenience of making a single serving anywhere with just hot water made it ideal for hospital rooms and recovery situations.

Cancer patients and their caregivers found that the product helped maintain nutrition during treatment periods when appetite and taste preferences were compromised. The variety of flavors and the gentle, comforting nature of broth made it more appealing than many other options.

"We never expected that ever. It was not something that we had imagined originally. But that's the thing about listening—that right customer base will come to you. And you have to be ready for it, and you have to be able to speak their language."

This customer insight led to partnerships with healthcare organizations and influenced their product development and marketing strategies. Rather than focusing solely on the general health and wellness market, they began targeting specific communities where their product provided genuine value.

Innovation Through Outsider Perspective: The Advantage of Not Knowing

LLance attributes much of their success to their status as outsiders in the food industry. While this created challenges—they had to learn everything from scratch—it also provided a crucial advantage: they weren't constrained by industry conventions.

"We still don't consider ourselves experts in the food business necessarily. We kind of consider ourselves as outsiders, and what's great about that is it really gives us the opportunity to look at the challenges as an outsider, not as an insider. A lot of insiders to the food industry are bound by what's been done in the past."

Industry insiders often approach problems with preconceived notions about what's possible, practical, or profitable. They know the "right" way to do things based on historical precedent. While this knowledge can prevent mistakes, it can also prevent innovation.

LLance and Lori approached each challenge with fresh eyes. When they encountered obstacles, they looked for creative solutions rather than accepting that "this is just how things are done." Their background in software sales and education provided different perspectives and problem-solving approaches that proved valuable in the food industry.

This outsider perspective was crucial in creating an entirely new product category. An industry insider might have dismissed the idea of broth in teabags as impractical or unmarketable. They might have been discouraged by the manufacturing challenges or steered toward more conventional product formats.

"We would have never created a new category like this if we were an insider in the food business because you're kind of bound by what someone else has done."

Their reference point wasn't other food products—it was the innovation they admired in companies like Campbell's Soup, which had revolutionized soup consumption by creating condensed soup in smaller cans. Campbell's innovation wasn't about the soup itself; it was about convenience and practicality.

Similarly, Millie's innovation wasn't about creating new flavors or ingredients. It was about making fresh, nutritious broth available anywhere with just hot water—in offices, hospitals, airplanes, or anywhere else people might want a healthy, satisfying snack.

The Art of Product Development: Creating Daily Use Habits

One of the key insights that separated Millie's Sipping Broth from traditional broth products was the shift from occasional cooking ingredient to daily consumption item. This transformation required careful consideration of flavors, convenience, and customer habits.

Traditional broth is primarily used for cooking—making soups, stews, or as a base for other dishes. It's not typically consumed on its own, and usage is infrequent and project-based. LLance and Lori recognized that to build a successful business, they needed to create a product that people would use regularly, ideally daily.

"As a sipping broth, we are using this on a daily basis, so it makes it a little bit different."

This meant the flavors had to be formulated for easy drinking rather than cooking. The spice levels needed to be gentle enough for direct consumption but flavorful enough to be satisfying. The salt content had to be balanced to provide taste without being overwhelming when consumed regularly.

They developed four core flavors, each designed to appeal to different preferences and occasions:

Tomato Basil became their flagship flavor, based on the fact that tomato basil is the most popular soup flavor in the country. The familiar, comforting taste made it an easy entry point for new customers.

Thai Lemongrass offered a more exotic option with citrusy, savory notes that could be enhanced with additions like turmeric for extra health benefits.

Spicy Tortilla provided a Mexican-inspired option that could be combined with protein powder for a more substantial snack or meal replacement.

Delight Pho brought Vietnamese flavors to the lineup, with enough complexity to work in creative applications like the "pho margarita" that LLance demonstrated.

Each flavor was designed to work on its own but also to serve as a base for customer creativity. LLance encouraged experimentation, sharing recipes on their website for everything from protein-enhanced versions to cocktail applications.

The packaging reinforced the daily use positioning. Individual teabags in boxes made it easy to take to work, travel with, or keep in desk drawers. The steeping process was familiar to anyone who had made tea, requiring no special equipment or techniques beyond the signature "schmush" to extract maximum flavor.

Building Resilience Through Setbacks: The Growth Mindset

Perhaps the most remarkable aspect of LLance and Lori's journey is how they transformed setbacks into stepping stones. Rather than being discouraged by obstacles, they developed a systematic approach to learning from failures and building resilience.

Each manufacturing partner that didn't work out taught them something valuable about vendor selection, contract negotiation, and quality control. Each customer complaint provided insights into product improvements or communication strategies. Each supply chain disruption forced them to develop more robust systems and backup plans.

"Every time we had a setback, the only thing that got us through was our personal goals. But what we've been able to do is have a very slow, steady growth."

Their approach to setbacks was notably practical. When problems arose, they focused on what they could control rather than dwelling on circumstances beyond their influence. When they couldn't deliver exactly what customers wanted, they communicated honestly about limitations and timelines.

This resilience proved crucial during the COVID period and the subsequent Walmart scaling. The experience of working through smaller challenges had built their problem-solving muscles and confidence. When faced with much larger obstacles, they had a proven framework for breaking down complex problems into manageable pieces.

The setbacks also helped them develop realistic expectations. Rather than promising what they hoped to achieve, they learned to promise what they knew they could deliver and then work to exceed those commitments. This approach built trust with retail partners and customers while reducing stress on their operations.

The Future of Sipping Broth: Lessons for Entrepreneurs

As LLance demonstrates the versatility of his product—making everything from protein-enhanced fitness drinks to creative cocktails—it's clear that Millie's Sipping Broth has achieved something rare in the food industry: they've created a genuinely new category while building a sustainable, profitable business.

Their success offers several key lessons for entrepreneurs, particularly those looking to create innovative consumer products:

Start with a real problem experienced by real people. Lori's need for a healthy workplace snack wasn't unique—it represented a widespread challenge that existing products didn't address well.

Test early and often with actual customers. The Pike Place Market experience was invaluable for refining their product, packaging, pricing, and presentation. Direct customer feedback shaped every aspect of their business.

Persistence trumps perfection. The six-year journey to perfect their manufacturing process would have discouraged many entrepreneurs. LLance and Lori's willingness to keep trying, learning, and improving ultimately led to breakthrough success.

Choose partners carefully but expect multiple iterations. Going through four manufacturing partners was frustrating but educational. Each partnership taught them more about what to look for in the next one.

Focus on your core competencies while partnering for specialized expertise. Rather than trying to become manufacturing experts, they found partners who could handle production while they focused on innovation and marketing.

Be prepared for success by building systems and capabilities gradually. Their COVID experience and gradual scaling prepared them for the Walmart opportunity in ways that rapid early success might not have.

Listen to customers to discover your true market. The healthcare applications they discovered weren't in their original business plan, but they became crucial to their success.

As LLance takes a final sip of his pho margarita—admittedly an unusual choice for 10:45 AM—he embodies the creative, persistent spirit that transformed a simple kitchen experiment into a national brand. The journey from stapling together Lipton tea bags to seeing their product on Walmart shelves represents more than business success; it's a testament to the power of solving real problems with simple, innovative solutions.

For entrepreneurs watching this demonstration, the message is clear: the next great innovation might be sitting right in front of you, waiting for someone to ask, "Why didn't I think of that?"—and then actually think of it.

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Leading Out Loud: The Power of Courageous Communication by GA Pimpletown

"Every time we've had either a crash, an economic slowdown, any kind of economic trauma in our country that affected the masses, there has always been a group of people that have gone into that and come out of that much better than they went into it."

In the rapidly evolving landscape of modern business, change isn't just constant—it's accelerating at an unprecedented pace. Whether you're earning a thousand dollars a year or a hundred million, whether you're a W-2 employee or a seasoned entrepreneur, the economic shifts happening right now will affect every aspect of your financial life. The key isn't to fear these changes, but to understand them, prepare for them, and position yourself to emerge stronger on the other side.

The reality is stark but not hopeless: we're facing what experts are calling "cataclysmic changes" occurring at the speed of light across every avenue of commerce and economics. Yet within this uncertainty lies unprecedented opportunity for those who know how to navigate these waters with agility and strategic thinking.

The Hidden Abundance in Economic Uncertainty

Despite the doom and gloom that dominates headlines, there's a crucial truth that often gets overlooked: there is an extraordinary amount of money and opportunity available right now. The challenge isn't the absence of opportunity—it's knowing where to look and how to position yourself to capture it.

The digital revolution has democratized wealth creation in ways that were unimaginable just a decade ago. Today, you can literally make money from your phone, provided you have the right strategies and understand the tools at your disposal. The key is recognizing that information and opportunity are everywhere, but they require a strategic approach to harness effectively.

Consider this fundamental shift: traditional business models that relied on face-to-face interactions were forced to pivot during the pandemic. Companies that successfully made the transition to virtual operations didn't just survive

—they discovered they could operate more efficiently and serve clients more effectively. A business that once required in-person meetings, handshakes, and lunch appointments transformed within four months to operate completely virtually. The result wasn't just survival, but the ability to offer both virtual and in-person services, dramatically expanding their market reach.

This adaptability represents one of the greatest strengths available to modern businesses: the agility and speed to pivot quickly. In today's environment, you don't need to commit to long-term strategies without testing them first. The concept of 30-day MVP (Minimum Viable Product) testing cycles has revolutionized how smart businesses operate.

The Power of Rapid Testing and Optimization

The old model of business planning—developing five-year plans and sticking to them regardless of market feedback—is not just outdated, it's dangerous. Today's successful businesses operate on rapid testing cycles that allow them to validate ideas quickly and pivot when necessary.

The 30-day testing framework works like this: instead of investing months or years into unproven strategies, you test new approaches for exactly 30 days. You use A-B validation, comparing two different methods to see which performs better, measure the results, and then pivot based on actual data rather than assumptions.

This approach is particularly powerful when applied to client engagement and conversion. Most people don't realize that the average client needs to be touched 27 times before they convert from first contact to actual paying customer. Understanding this statistic changes everything about how you approach marketing and sales.

Tools like Google Optimize allow you to test different approaches to client engagement, automation sequences, and conversion funnels without massive upfront investments. Whether you're trying to solve automation challenges, improve client engagement, or optimize your sales funnel, you can test multiple approaches simultaneously and let the data guide your decisions.

The integration of project management tools like Trello and Asana takes this optimization to the next level. But even more powerful are AI-powered systems that can handle multiple business functions simultaneously. Imagine having seven AI agents working in the background 24/7, handling your social media posting, creating captions, generating images, scheduling content, and even filtering your emails to forward only the most important ones. This isn't science fiction—it's available right now.

The Economics of AI Integration

Here's a question that should fundamentally shift how you think about business operations: What costs more—employing 10 people or paying \$29.99 to employ 10 AI agents? The answer is obvious, but the implications are profound.

This isn't about replacing human creativity or relationship-building—it's about optimizing your resources so you can focus on what truly requires human intelligence and emotional connection. When AI handles routine tasks, scheduling, basic customer service, and content creation, you're free to focus on strategy, relationship building, and high-level problem-solving.

The key principle here is optimization: optimize your spend so you can optimize your investment. This applies not just to your business, but to every area of your financial life—your home, your family expenses, your personal investments.

Consider this real-world example of comprehensive financial optimization: Over a six-year period, one client completely restructured their relationship with homeownership. Instead of continuing to pay a mortgage, they sold their home, took the equity, and used it to finance their business for five years while transitioning to renting. But here's the sophisticated part: they used a portion of the home sale proceeds to purchase two duplexes. The rental income from these duplexes now pays their personal rent, while the remaining capital funds their business operations.

This is optimization thinking—looking at every financial decision not in isolation, but as part of an integrated strategy that maximizes flexibility and return on investment.

Building Sustainable Revenue Streams

As we look toward 2026, the economic landscape is going to present what experts are calling "a tight squeeze" on multiple fronts. Credit will be harder to obtain, consumer spending will be more cautious, and traditional business models will face increased pressure. In this environment, businesses that rely solely on acquisition marketing and one-time transactions will struggle.

The solution lies in building sustainable, recurring revenue streams through community building and membership models. This isn't just about creating a subscription service—it's about building genuine relationships with your clients that provide ongoing value and create predictable revenue streams.

Niche specialization becomes crucial in this environment. Instead of trying to serve everyone, successful businesses will identify specific communities, understand their unique challenges, and become the go-to solution provider for those particular problems. This approach allows you to build deeper relationships, charge premium prices, and create more stable revenue streams.

The Consumer Price Index trends show that people are holding onto their money more tightly. This means you can't rely on broad-based marketing to drive sales. You need to get laser-focused on who your ideal client is, understand their specific pain points, and position yourself as the obvious solution to their problems.

This is also an optimal time to explore expanded SBA (Small Business Association) financing options. There are currently 47 banks specifically offering financing to people who have been laid off or affected by government downsizing. These opportunities won't last forever, but they're available now for businesses that know where to look.

Addressing Critical Business Vulnerabilities

While opportunities abound, there are specific vulnerabilities that can sink even the most promising businesses if not addressed proactively. The most critical is cash flow management. You need three to six months of operating expenses in reserve, and you need to automate your collection processes.

This isn't the time to be making deals or accepting payment plans out of kindness. You need to value what you do and ensure you're paid for it promptly. Automated collection systems remove the emotional component from getting paid and ensure consistent cash flow without requiring you to make uncomfortable phone calls.

Founder dependence is another critical vulnerability. If your business can't operate without your constant involvement, you don't have a business—you have an expensive job. Creating Standard Operating Procedures (SOPs) for every aspect of your business operations isn't just good practice, it's essential for scalability and your own sanity.

Equally important is establishing a relationship with a qualified CPA—and not just during tax season. The tax landscape is changing dramatically, with deregulation creating new opportunities for business owners to claim more deductions and access more tax breaks. But these opportunities are only valuable if you know about them and structure your business to take advantage of them.

The Corporate Transparency Act filings represent a perfect example of compliance challenges that can create expensive problems if ignored. Many business owners received conflicting information about whether they needed to file BOI (Beneficial Ownership Information) reports—first being told they needed to file, then told they didn't, then told they did again. The current status requires consultation with your CPA and your state, as enforcement will likely vary by jurisdiction despite being a federal requirement.

Capitalizing on Emerging Opportunities

Despite the challenges, 2025 and 2026 present extraordinary opportunities for businesses that position themselves correctly. There are new and adjusted deductions available, R&D credits, bonus depreciation treatments, and numerous other tax advantages that weren't available in previous years.

Strategic expense timing becomes crucial in this environment. Instead of spending money randomly throughout the year, you need to be intentional about when and how you make business investments to maximize tax advantages and cash flow.

AI adoption isn't just recommended—it's essential. Beyond the operational efficiencies, you can write off AI tools as business expenses and potentially qualify for tax credits for technology adoption. If you have employees, AI can reduce your payroll burden while potentially increasing productivity.

The SBA is currently offering expanded funding options, fee waivers, and grants specifically for manufacturing businesses, veteran-owned businesses, and rural businesses. Large grants are being distributed because allocated funds need to be deployed. This represents a unique window of opportunity that won't remain open indefinitely.

Understanding and Preparing for Economic Threats

While focusing on opportunities, it's crucial to understand the specific threats that could impact your business. Policy uncertainty tops the list, with tax changes and new regulations rolling out throughout 2026. Interest rates present a complex challenge—while rates may decrease, this will actually result in higher borrowing costs as banks tighten lending standards and demand higher risk premiums.

Regulatory shifts and enforcement changes will affect different industries differently. The key is maintaining legal and compliance counsel and developing rapid response capabilities. One real estate agent's failure to stay current with regulatory changes resulted in \$172,000 in unexpected tax liabilities—a mistake that could have been avoided with proper professional guidance.

Economic slowdown is not a possibility—it's a certainty. The question isn't whether it will happen, but how severe it will be and how long it will last. Your preparation should include analyzing whether your clients will have discretionary income during economic stress. If your business depends on luxury spending or non-essential services, you need contingency plans.

The Historical Pattern of Crisis and Opportunity

History provides a powerful lesson about economic disruption and opportunity. Consider the story of John D. Rockefeller and how he navigated one of the greatest business disruptions in American history. Rockefeller built Standard Oil into a monopoly that literally lit the entire United States. But then

electricity arrived, championed by J.P. Morgan and Edison, threatening to make his oil-based lighting obsolete.

Simultaneously, the government forced him to break up his conglomerate into smaller companies due to antitrust concerns. Most people would see this as the end of an empire. Rockefeller saw it as the beginning of a new one.

He recognized that oil refining produced a waste product—gasoline—that could fuel the new Model T automobiles. At the time, farmers were using corn-based ethanol to fuel their vehicles. Rockefeller launched a sophisticated campaign to eliminate this competition. He helped establish the Food and Drug Administration and the American Medical Association, partly to create regulatory barriers against corn-based fuel. He supported Prohibition, making grain alcohol illegal. And while his competitors were dealing with these regulatory challenges, he built gas stations across the country.

When Prohibition ended and the regulatory environment stabilized, Americans were already accustomed to buying gasoline at Rockefeller's stations. He had transformed a business disruption into the foundation of an even larger empire.

This story illustrates a crucial principle: during every major economic disruption in American history, there has always been a group of people who emerged wealthier than when they entered. These weren't necessarily the already wealthy—they were the people who remained agile, prepared for change, and positioned themselves to capitalize on new opportunities.

Your 30-Day Action Plan

Given the scope of changes ahead, immediate action is essential. Your first priority should be a comprehensive tax and entity review. Ensure your business structure (LLC, S-Corp, C-Corp) aligns with your current situation and future plans. Schedule a CPA review specifically focused on 2025 and 2026 tax implications—this single conversation could save you tens of thousands of dollars.

Develop a 90-day cash and credit forecast. Know exactly how much money you need to operate for the next quarter, and identify multiple funding sources.

Don't rely on a single credit line or funding source—diversification in funding is as important as diversification in investments.

Address the beneficial ownership information filing requirements by consulting with your CPA and checking your state's specific requirements. The federal guidance has been inconsistent, but your local professionals will understand how enforcement will actually work in your jurisdiction.

Automate every business process you possibly can, to the point where you're only handling essential communications and decision-making. If you're not sure where to start with automation, focus on email filtering, social media scheduling, and basic customer service responses.

Conduct a stress test of your business by preparing for a 20-30% drop in revenue. This isn't pessimistic planning—it's realistic preparation. Try to operate your business on 20-30% less income for a month and identify what adjustments would be necessary if this became permanent.

Finally, research and apply for relevant grants. There are currently more grant opportunities available than in recent years, but they require proactive research and application. Don't assume you don't qualify—many grants have broader eligibility criteria than people realize.

The months ahead will separate businesses that merely survive from those that thrive. The difference won't be luck or timing—it will be preparation, agility, and the willingness to embrace change as opportunity rather than threat. The tools and strategies exist to not just weather the coming economic changes, but to emerge stronger, more efficient, and more profitable than ever before.

The question isn't whether change is coming—it's whether you'll be ready to capitalize on it when it arrives.

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Storyselling in the SWOT Model by Jen Bullington

"Your expertise will get you noticed, but your stories are going to make you unforgettable."

In an age where artificial intelligence can replicate almost any business function and market noise drowns out even the most polished presentations, one element remains uniquely yours: your authentic business stories. These aren't just anecdotes or casual conversations—they're strategic assets that can transform how clients perceive your value, remember your expertise, and ultimately choose to work with you.

The power of storytelling in business isn't just intuitive; it's scientifically proven. When you tell a story, you're not simply conveying information—you're creating an experience that engages multiple areas of the brain simultaneously, making your message up to 22 times more memorable than facts alone. This neurological advantage becomes your competitive edge in a marketplace where everyone offers similar services, products, and credentials.

The Million-Dollar Story That Never Got Told

Consider this haunting example: In 2018, when the Tax Cuts and Jobs Act introduced new regulations for real estate repair deductions, a skilled accounting partner identified an opportunity that most would miss. By reapplying the new statute and refiling two years of tax returns for one client, they saved the company \$948,000 with a single strategic move.

This should have been a story that transformed their practice. It should have become a powerful testimonial, driven social media campaigns, reshaped their website messaging, and anchored countless presentations. Instead, it died in an email thread. The partners worried about confidentiality, failed to see the storytelling potential, and let one of the most compelling proof points of their expertise slip away unused.

That untold story represents exactly zero dollars in additional business value. Meanwhile, every potential client who might have heard it and thought, "I want to see what they can do for my business," never got the chance. The cost of not telling your stories extends far beyond missed marketing opportunities

—it closes doors to credibility, trust, and the kind of word-of-mouth referrals that build lasting businesses.

This scenario plays out across industries every day. Professionals focus so intently on the technical aspects of their work that they overlook the transformative power of sharing how that work changes lives, saves money, creates opportunities, or solves critical problems. They lead with what they do rather than the results they achieve, missing the emotional connection that drives decision-making.

The Science Behind Story Selling

The distinction between facts and stories isn't just philosophical—it's neurological. When your brain processes facts, it activates three or four discrete areas, primarily in the speech center and a few unconnected regions. The response is limited, isolated, and easily forgotten.

Stories, however, light up your entire brain like a neural fireworks display. They activate interconnected areas across both the frontal and back cortex, engaging not just the logical processing centers but also the limbic system—that ancient "lizard brain" responsible for survival instincts and emotional responses. This comprehensive neural engagement means stories aren't just heard; they're experienced.

This neurological reality explains why you might forget a presentation full of statistics by lunchtime but remember a compelling story for years. When someone shares a story, your brain doesn't just process information—it creates an emotional imprint that becomes part of your memory architecture.

The business implications are profound. While facts appeal to the rational mind, emotions drive purchasing decisions. Research consistently shows that 80-95% of buying decisions are emotional, with logic serving primarily to justify choices already made at the emotional level. When you lead with stories instead of facts, you're speaking directly to the part of the brain that actually makes decisions.

Even in B2B environments, where decision-makers pride themselves on rational analysis, emotions play a crucial role. Internal stakeholders may

require more factual justification than external customers—about 60% emotional versus 95%—but the emotional component remains significant. The most effective business communications combine both elements: stories to create emotional engagement and facts to provide rational justification.

From Coffee Beans to Community: The Starbucks Transformation

One of the most powerful examples of strategic storytelling comes from an unlikely source: a small Seattle coffee roaster that transformed itself into a global phenomenon through the power of narrative.

When Starbucks opened in 1971—the same year "Stairway to Heaven" and "American Pie" dominated the airwaves—it was simply Starbucks Coffee, Tea and Spice. The founders were coffee enthusiasts frustrated by the weak, mass-market coffee that dominated American kitchens. Maxwell House and Folgers represented the standard, and quality dark roast beans were virtually impossible to find.

The original Starbucks was purely product-focused. They sold beans, grinders, and brewing equipment from a small storefront with no seating. The only brewed coffee they offered came in tiny sample cups to help customers choose between different bean varieties. For over a decade, they remained a regional specialty retailer with a clear but limited value proposition.

Everything changed when Howard Schultz entered the picture. Working for a Swedish housewares company, Schultz noticed that his biggest customer for coffee makers was this small Seattle roaster. Intrigued by their substantial orders, he traveled west to meet them in 1982 and eventually joined as their director of marketing.

The following year, Schultz visited Italy and experienced something that would reshape not just Starbucks, but American coffee culture entirely. He discovered Italy's rich espresso tradition—the morning latte, the 10 a.m. break, the afternoon ritual. More than the coffee itself, he observed the community, connection, and belonging that centered around these coffee experiences.

Schultz realized that Starbucks was thinking too small. They weren't really in the coffee business at all—they were in the people business, serving coffee as

a vehicle for human connection. He envisioned creating a "third place" between home and work, where people could gather, connect, and belong.

This insight required a complete business model transformation. Starbucks added seating, expanded their menu, and fundamentally reimagined their purpose. They evolved from selling coffee as a commodity to creating coffee as a community experience. Their brand story shifted from "we sell premium coffee beans" to "we create belonging and connection."

The results were extraordinary. In 1987, Starbucks operated 11 locations. Within a decade, they had expanded to thousands of stores worldwide, transforming from a regional specialty retailer to an international lifestyle brand. They didn't scale because they had better coffee beans—they scaled because they had a better story.

The Starbucks transformation illustrates a crucial principle: a clear, compelling story will always scale faster than a clear product. Coffee beans, as functional as they are, aren't inherently exciting. But the experience of connection, community, and ritual that surrounds coffee consumption? That's a story people want to be part of.

Reframing SWOT Through Strategic Storytelling

The traditional SWOT analysis—Strengths, Weaknesses, Opportunities, Threats—provides a useful framework for strategic assessment, but it often produces dry, fact-based outputs that fail to inspire action or create emotional connection. By reimagining SWOT through a storytelling lens, you can transform this analytical tool into a powerful narrative framework that builds your brand while providing strategic insight.

In a story-driven SWOT model, each quadrant serves a different narrative purpose:

Strengths become Proof Stories: Rather than listing abstract capabilities like "excellent customer service" or "deep industry expertise," proof stories demonstrate these strengths in action. They show specific examples of how your expertise delivered measurable results, how your team solved complex

problems, or how your approach created value that competitors couldn't match.

Weaknesses become Redemption Stories: Instead of trying to minimize or hide limitations, redemption stories transform weaknesses into powerful narratives of growth, learning, and improvement. These stories humanize your brand by showing honesty, vulnerability, and the capacity to evolve.

Opportunities become Vision Stories: Rather than simply identifying market trends or potential areas for growth, vision stories paint a compelling picture of your future direction. They show how you're innovating, where you're headed, and how you're positioning yourself to serve clients in new ways.

Threats become Resilience Stories: Instead of just acknowledging external challenges, resilience stories demonstrate how you've adapted, overcome adversity, and maintained stability through change. They prove your ability to navigate uncertainty and continue delivering value regardless of external pressures.

This narrative approach transforms SWOT from a static analytical exercise into a dynamic storytelling framework that serves multiple purposes simultaneously. It provides strategic insight while building brand narrative, creates internal alignment while developing external messaging, and combines analytical rigor with emotional engagement.

The Power of Redemption: Learning from Domino's Pizza

The most counterintuitive yet powerful element of story-driven SWOT analysis lies in the weakness quadrant, where redemption stories can become your strongest competitive advantage. The key insight is that what matters isn't the mistake itself, but the story you tell about how you addressed it.

Domino's Pizza provides a masterclass in redemption storytelling. By the late 2000s, the brand faced a crisis of customer confidence. Reviews consistently described their pizza as tasting like cardboard with ketchup for sauce. Customer satisfaction was plummeting, and the brand's reputation for speed couldn't compensate for widespread dissatisfaction with product quality.

Most companies would have quietly reformulated their recipes, perhaps issued a brief statement about "continuous improvement," and hoped customers would gradually notice the changes. Domino's chose the opposite approach: they made their redemption story the centerpiece of their marketing strategy.

The "Pizza Turnaround" campaign featured executives and employees reading actual customer complaints on camera—unfiltered, harsh feedback about how terrible their pizza tasted. They brought cameras into their kitchens, showing the complete recipe overhaul process: new dough, new sauce, new approach. They didn't make excuses or try to spin the criticism. Instead, they said simply, "You told us, we listened."

The campaign invited customers into the change process rather than just announcing the results. They showed the work, acknowledged the criticism, and asked people to try again and judge for themselves. This radical transparency turned a brand weakness into a compelling narrative of responsiveness and improvement.

The results were remarkable. Within five years, Domino's stock price quadrupled, sales soared, and customer trust reached new heights. They transformed from a struggling regional chain into a global brand. The redemption story didn't just help customers forgive past problems—it made them actively root for Domino's success.

This transformation illustrates why redemption stories are so powerful: they demonstrate humility, transparency, and the capacity for growth. They show that you listen to feedback, take responsibility for problems, and have the commitment and capability to improve. In a marketplace where trust is increasingly valuable, the willingness to acknowledge and address weaknesses can become a significant competitive advantage.

Internal vs. External Story Alignment

One of the most critical yet overlooked aspects of strategic storytelling involves the alignment between internal and external narratives. Your internal story—what your team believes about your company's purpose, values, and direction—directly influences the external story that customers experience.

Consider Amazon's challenge in recent years. Externally, they promote stories about customer obsession, convenience, and innovation. But when news emerges about warehouse working conditions or driver experiences that contradict these values, the disconnect erodes trust and authenticity. Customers can sense when internal culture doesn't match external messaging.

The story your team believes determines the story your clients buy. This makes internal storytelling just as important as external marketing narratives. When employees understand and connect with your company's stories, they become authentic ambassadors who naturally reinforce your brand message in every customer interaction.

Internal story alignment requires asking different questions than external marketing research. Instead of focusing on competitive differentiation or market positioning, internal storytelling explores questions like:

- What story proves what we do best as a company?
- What story shows how we've grown and learned?
- **What story illustrates where we're going next?**
- What moment made you proud to work here?

Your employees often recognize your best stories before leadership does. They're closest to customer interactions, problem-solving moments, and the daily work that creates value. Encouraging them to share stories that demonstrate your values in action not only helps identify powerful narrative content but also reinforces cultural alignment.

The difference between internal and external storytelling isn't just audience—it's purpose. External stories focus on market differentiation, competitive advantage, and customer value proposition. Internal stories focus on culture, purpose, and shared identity. Both are essential, and both must align to create authentic brand experience.

Practical Implementation: Building Your Story Arsenal

The transition from understanding storytelling principles to implementing them strategically requires systematic approach to story collection,

development, and deployment. This isn't about becoming a professional storyteller overnight—it's about recognizing, capturing, and strategically using the powerful stories that already exist in your business.

Start with story archaeology: dig through your existing materials to identify narrative gold. Customer testimonials often contain story fragments that can be expanded into compelling narratives. Project case studies may focus on technical details while missing the human impact. Success metrics might capture results without explaining the journey that achieved them.

Look for moments of transformation, challenge, breakthrough, or unexpected success. The best business stories often emerge from situations where your expertise, creativity, or persistence made a meaningful difference. These might include:

- Times when you solved a problem others couldn't address
- Situations where you went beyond expected service to help a client
- **Moments when your team overcame significant challenges**
- Instances where your approach produced unexpectedly positive results
- Examples of how your work changed someone's business or life

Don't worry about being a natural storyteller. Modern tools can help bridge the gap between having great stories and telling them effectively. You can record yourself describing a situation, use transcription tools to capture the content, and then refine the narrative with assistance from AI platforms or professional writers.

The key is to move beyond vague generalizations toward specific, concrete examples. Instead of saying "we provide excellent customer service," tell the story of staying late to solve an urgent problem, or going extra miles to meet an impossible deadline, or finding creative solutions when standard approaches wouldn't work.

Remember that your most powerful stories often involve overcoming adversity, learning from mistakes, or growing through challenges. These

redemption narratives humanize your brand and create emotional connection that purely positive stories cannot achieve.

Strategic Deployment Across All Touchpoints

Once you've identified and developed your core stories, strategic deployment becomes crucial. These narratives shouldn't be reserved for special presentations or marketing materials—they should be woven throughout all your business communications and customer touchpoints.

Your website can feature stories instead of just service descriptions. Instead of listing "tax planning services," share a story about helping a client save substantial money through creative application of new regulations. Rather than stating "we provide business consulting," tell the story of guiding a company through a critical transition that secured their future.

Sales conversations become more engaging when built around relevant stories rather than feature lists. When a prospect describes their challenge, respond with a story about helping someone in a similar situation rather than immediately pitching your services. Let them see your expertise in action rather than just hearing about your qualifications.

Presentations gain power when structured around narrative rather than bullet points. Instead of covering "our capabilities" and "our results," tell stories that demonstrate capabilities while illustrating results. Your audience will remember the stories long after forgetting the statistics.

Social media content becomes more shareable when it tells stories rather than just sharing information. Behind-the-scenes stories about your team, client success stories (with permission), and even stories about lessons learned from challenges can generate engagement and build community around your brand.

Internal communications benefit from storytelling as much as external marketing. Team meetings that include stories about recent successes, client feedback, or examples of living company values reinforce culture and motivation more effectively than policy updates or performance metrics alone.

Measuring Story Impact and Refining Your Approach

The effectiveness of strategic storytelling can be measured through both quantitative and qualitative indicators. While stories primarily create emotional impact, this emotional engagement translates into measurable business outcomes.

Direct indicators include increased engagement with story-driven content, longer website session times when stories are featured, higher response rates to story-based marketing campaigns, and more referrals from clients who connect with your narratives. Sales cycles may shorten when prospects hear relevant stories that help them envision working with you.

Qualitative feedback often provides the clearest evidence of story impact. When clients mention specific stories you've shared, reference them in their own communications, or connect your stories to their decision-making process, you're seeing storytelling effectiveness in action.

Pay attention to which stories resonate most strongly with different audiences. Technical audiences might respond best to problem-solving stories that demonstrate expertise, while executive audiences might prefer transformation stories that show business impact. Refine your story selection based on audience response.

Remember that storytelling is a skill that improves with practice. Your first attempts at strategic storytelling may feel awkward or forced, but consistent practice develops natural narrative ability. Record yourself telling stories, ask for feedback from trusted colleagues, and observe how audiences respond to different narrative approaches.

The goal isn't perfection—it's authentic communication that creates connection and demonstrates value. Your genuine stories about real experiences will always outperform polished narratives that lack authenticity or relevance.

Building Your Story-Driven Future

In a world where artificial intelligence can replicate technical skills and market noise drowns out traditional marketing messages, your authentic

business stories represent your most defensible competitive advantage. They cannot be copied, automated, or commoditized because they emerge from your unique experiences, relationships, and approach to serving clients.

The businesses that thrive in this environment will be those that master the art and science of strategic storytelling. They'll use narrative to create emotional connection, demonstrate expertise, build trust, and inspire action in ways that facts alone cannot achieve.

Your story-driven SWOT analysis becomes more than a strategic planning exercise—it becomes the foundation for all your communications, the source of your most compelling content, and the framework for building authentic relationships with both team members and clients.

The investment in developing your storytelling capabilities pays dividends across every aspect of your business. Stories improve sales effectiveness, enhance marketing impact, strengthen team culture, and create the kind of memorable brand experience that generates referrals and repeat business.

Start now. Begin collecting your stories, practicing your narrative skills, and strategically deploying these powerful tools across all your business communications. Your expertise may get you noticed, but your stories will make you unforgettable.

The companies that understand and implement strategic storytelling won't just survive in an increasingly competitive marketplace—they'll thrive by creating the kind of authentic connection that no amount of technology can replicate. Your stories are your advantage. Use them strategically, tell them authentically, and watch as they transform not just your marketing but your entire business trajectory.

In the end, every business is in the people business, regardless of what products or services they provide. Stories are how people connect, learn, remember, and make decisions. When you master the strategic use of narrative, you're not just improving your communication—you're building the foundation for sustainable competitive advantage in an age where authentic human connection becomes increasingly valuable.

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Culture, Communication & Conversion: Leadership Lessons from the Call Floor

by Richard Blank

"If you can get past your parents' guilt, my friends, you can live anywhere in the world. You just have to decide to live your own life or a life of somebody else."

In an age where artificial intelligence dominates customer service and automated systems have replaced human voices, one entrepreneur in Costa Rica has built a thriving business on a seemingly simple principle: genuine human connection still matters. Richard Blank's journey from Northeast Philadelphia to becoming CEO of Costa Rica's Call Center is more than just a business success story—it's a masterclass in the power of authentic communication and the courage to forge your own path.

Breaking Free from Conventional Expectations

Richard Blank's story begins in a place familiar to many young adults: standing at the crossroads between parental expectations and personal dreams. Growing up in Northeast Philadelphia and graduating from Abington High School in 1991, he watched as his peers followed predictable paths into medicine, law, engineering, or family businesses. The pressure to conform was immense, but Blank had discovered something that set him apart—a passion for languages, particularly Spanish.

"If you can get past your parents' guilt, my friends, you can live anywhere in the world," Blank reflects. "You just have to decide to live your own life or a life of somebody else." This philosophy would become the foundation of everything that followed.

His decision to major in Spanish at the University of Arizona wasn't just an academic choice—it was a declaration of independence. While others chose careers based on security and social expectations, Blank was investing in his ability to connect with people across cultures. This investment would prove invaluable when, in August 2000, he received what he calls "a one in a million shot" to move to Costa Rica for what was supposed to be just a couple of months.

The original plan was simple: work at a friend's call center, teach some English, and learn the business from the inside out. But sometimes the universe has bigger plans than we do. Those "couple of months" turned into four years of intensive learning, relationship building, and skill development. In 2004, nineteen years ago, Blank made the leap that would define his career—he started his own call center.

Redefining an Industry's Reputation

The call center industry carries significant baggage. Most people's experiences with call centers involve frustrating dinner-time interruptions, endless automated menus, and representatives who seem more interested in getting through their script than solving problems. Blank recognized this reputation problem as an opportunity.

"Everyone's got a horror experience," he acknowledges. "And so I wanted to change it. I didn't want to make it like a print where it's mass produced. Everything is custom made where if you extend empathy, if you take copious notes, if you really care about the client, you don't have to dig or beg for it."

His approach represents a fundamental shift from volume-based to relationship-based communication. While most companies have moved toward non-voice support—text, emails, and chat—Blank focuses on that crucial 10% of interactions that require genuine human connection. These are the conversations that can make or break business relationships, the moments where empathy and understanding create lasting value.

The foundation of his philosophy rests on what he calls "old school manners, social graces and etiquette." It's about treating every phone interaction as if you're sitting with your grandparents—with respect, attention, and genuine care. This approach transforms what could be a transactional exchange into a relationship-building opportunity.

The Science of Connection Through Voice

In Blank's world, the human voice becomes a powerful tool for creating connection in an increasingly digital landscape. He understands that when you remove the visual element from communication, other senses must compensate. "You're losing three of your senses—your taste, touch, and smell.

So your hearing should be expanded, and you should be using image streaming, descriptive, colorful vocabulary to paint that picture."

The difference between artificial intelligence and human communication, according to Blank, lies in imperfection. "AI, it's too perfect," he explains. "There are certain artists that need to make a little mark on their painting or these individuals that make quilts and blankets. They got to have one little stitch off just to show that we're human." This concept of the "uncanny valley"—where perfection becomes uncomfortable—explains why people still crave human interaction despite technological advances.

When a customer calls frustrated after navigating multiple automated systems, Blank's approach is counterintuitive: let them vent. "A lot of the times, my friend, it's about letting the steam out. If you let somebody vent, they get it out. And then you guilt them and go, 'Adrian, are you done? You want to curse a little more?' And so sometimes you get a client that really bonds with you because they were able to speak with you and share their needs."

This understanding of human psychology—that people often need to be heard before they can hear—transforms potentially negative interactions into relationship-building opportunities.

The Power of Names and Personal Recognition

One of Blank's most powerful techniques involves the strategic use of names and personal recognition. "When you use somebody's name you're bringing them back to a zero time start attention span, because usually people give you about 30 seconds," he explains. But it's not just about using names—it's about how you use them.

The key is authenticity. When Blank says someone's name, he does it with what he calls "Sparkle and with Chispa and with Vida, with life." The goal is to knock people out of their defensive trance. Most people receiving business calls are "black and blue" from poor experiences, so they're naturally guarded.

His approach goes beyond the initial interaction. Blank has developed what he calls "positive escalation"—a technique where he compliments one person to

another within the same organization. If Jonathan transfers him to Debbie, he might say, "Debbie, I just got to let you know, Jonathan's the best." This simple act drops defensive barriers and creates forward momentum.

But the real magic happens in the follow-up. When Blank sends meeting minutes, he mentions Jonathan in writing. "When I call your company back, Jonathan picks up the phone. All I got to go is 'Jonathan.' He goes, 'Is this Richard Blank?' Debbie came out of the office and said, 'You wrote about me and spoke about me. I've been here 10 years. You're the first person to ever do that.'"

This level of attention to detail and genuine appreciation for every person in the organization creates what Blank calls "extreme good faith." It's not a manipulation tactic—it's a genuine recognition that every person matters and contributes to the business relationship.

Building Foundations Before Making Asks

Blank's methodology emphasizes foundation-building over quick closes. He believes in starting every interaction with proper introductions, company name recognition, and establishing rapport before moving into business discussions. "I start, as I say, with a foundation. I make sure that your name is done. I properly introduce myself."

This approach requires patience and genuine interest in the other person. Rather than rushing to make a sale or set an appointment, Blank invests time in understanding company culture, learning when to call back, discovering email addresses, and noting important dates like company anniversaries. This information becomes invaluable when making future contact.

"When you gather that sort of information, when it comes time to making that final decision, regardless of my price or contractual terms, I will be taken into consideration just because of the good faith that I showed prior," he explains.

The philosophy extends to handling rejection. Blank reframes unsuccessful calls as "beautiful deaths." If he delivers a perfect introduction, properly represents himself and his company, and still gets rejected, he considers it a

successful interaction because he maintained his standards and kept his skills sharp.

Navigating Generational Differences in Communication

Managing a workforce of 150 bilingual agents across multiple generations has given Blank unique insights into how different age groups approach communication. He works with employees ranging from 18 to 38 years old, each bringing distinct strengths and challenges.

The youngest generation, those around 18, impresses him with their intelligence and access to information. "They have the library right at their fingertips where I used to have to ride my bike and find a book," he notes. However, this easy access to information sometimes means they haven't developed the same appreciation for effort and preparation that previous generations possessed.

The COVID-19 pandemic particularly affected younger workers' face-to-face communication skills. While they excel at digital communication where they can take time to craft responses, they sometimes struggle with the immediate reactions required in live conversations. "Their reaction time is off because when someone sends a text or that, they can ponder. They can write back at their convenience and leisure."

Blank addresses these challenges through structured training in soft skills: turn-taking, speaking once while listening twice, maintaining composure, and developing impulse control. The goal is to help younger agents sound mature and confident, regardless of their age.

The middle generation, around 28 years old, benefits from being trained by Generation X, so they retain many traditional communication skills while being comfortable with modern technology. The oldest group, around 38, relates most closely to Blank's own experience and serves as mentors for younger team members.

When it comes to serving older customers, Blank takes a completely different approach. Rather than seeing them as difficult, he views them as his easiest

clients. "The number one rule with somebody is to A, it's Mr. Jones. And then you thank them for their time. And then you say, 'You first.'"

His strategy with older customers is simple: let them talk. "He's going to answer eight out of 10 of your questions. Let him talk. He's going to talk about A through Z." While these calls take about 30% more time, the conversion ratios are significantly higher because older customers are willing to commit when they feel heard and respected.

The Art of Professional Call Management

Blank has developed specific techniques for managing different aspects of phone communication, from answering calls to ending them professionally. His approach to answering calls emphasizes giving each caller your complete attention, regardless of how many similar calls you've handled that day.

"It's like being a rock star," he explains. "INXS might play 'Need You Tonight' for the 10,000th time, but it would be the first time that I'm hearing it. As an artist, as a professional, you got to give that new person that 100% just because you're tired and you've repeated it and you've had good and bad experiences. It's not this other person's fault."

For ending calls, Blank uses what he calls the "landing the plane" approach—coming in "low, low, low and slow and then stop it." He always asks, "Before I go, do you have any more questions?" and counts to ten to ensure nothing is forgotten. His rule is simple: let the customer hang up first, because they might have one more thing to add.

Quality Control and Continuous Improvement

Running a successful call center requires sophisticated quality control measures. Blank's operation uses Key Performance Indicators (KPIs) to evaluate calls, looking for elements like proper questioning, clarification, appropriate tone, and patience. But his focus goes beyond metrics to emphasize soft skills, escalation handling, and relationship building.

The coaching approach is personalized, addressing individual challenges like pronunciation issues or pacing problems. "You're not pronouncing the word correctly because of your vowels, so why don't you write the word out

phonetically. Speak first, spell second so you don't see that as a hindrance when you're making your call."

This attention to individual development creates a culture where agents feel supported rather than criticized. Blank competes against technology giants like Amazon, HP, Intel, and Oracle for talent, but his smaller, more personal approach attracts people who want individual attention and career development.

Managing Expectations and Building Sustainable Relationships

One of the biggest challenges Blank faces is managing unrealistic client expectations. "There's so many, but if I had to think about the number one thing that comes to mind would be unrealistic expectations, like a sure thing," he explains. "Unless you're fixing the world series, I don't know what to tell you."

Success in call center operations depends on multiple variables: the quality of contact lists, the effectiveness of scripts, the appropriateness of the offer, the training process, and the cultural fit between client and service provider. Blank has learned to pass on more accounts than he accepts, prioritizing quality relationships over quick revenue.

"Ethically, I got to make sure that what I'm accepting into the center is something people can fulfill, feel good about, and I can give my client a return on investment," he states. This selective approach protects both his team's morale and his company's reputation.

The Future of Human Connection in Business

Richard Blank's success story offers important lessons for any business leader navigating the balance between efficiency and relationship building. In a world increasingly dominated by automation and artificial intelligence, his call center thrives by focusing on what technology cannot replicate: genuine human empathy, cultural understanding, and personal connection.

His approach proves that treating people with respect, taking time to build relationships, and maintaining high standards for communication can create sustainable competitive advantages. The investment in human connection

pays dividends not just in immediate sales results, but in long-term customer loyalty and business growth.

The key insight from Blank's experience is that technology should enhance rather than replace human interaction. While AI and automation can handle routine tasks, the moments that truly matter in business—the conversations that build trust, solve complex problems, and create lasting relationships—still require the irreplaceable human touch.

For entrepreneurs and business leaders, Blank's story demonstrates that success often comes from zigging when others zag. While the business world rushes toward automation, there's tremendous opportunity in doubling down on human connection. The companies that will thrive in the future are those that understand when to use technology and when to invest in genuine human relationships.

Richard Blank's journey from Philadelphia to Costa Rica, from Spanish major to call center CEO, proves that following your passion and treating people with genuine respect can create extraordinary opportunities. His success isn't just measured in revenue or company growth—it's reflected in the lives he's changed, the relationships he's built, and the standard he's set for human connection in business.

In an age of increasing digital disconnection, Richard Blank's Costa Rica Call Center stands as a testament to the enduring power of human communication. His story reminds us that behind every phone call, every business transaction, and every customer interaction is a human being deserving of respect, attention, and genuine care. And when we approach business with that mindset, extraordinary things become possible.

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Speak Up, Stand Out! Build Unshakable Confidence to Lead With Impact and Influence by Alex Dumas

"Your story matters and your voice matters. And when we speak up, we get to stand out."

The late hip-hop pioneer John Fletcher from Whodini once asked a profound question that still resonates today: "Friends, how many of us have them?" But beyond the catchy melody lies a deeper truth about human connection and the confidence required to build meaningful relationships. Fletcher himself embodied an unusual kind of confidence for his era—sporting a trademark cowboy hat and leather jumpsuit in a world dominated by machismo and tough-guy personas. His willingness to stand out in an industry that demanded conformity speaks to something essential about true confidence: it's not about fitting in, it's about having the courage to be authentically yourself.

This question of confidence—who has it, who lacks it, and how we build it—sits at the heart of every entrepreneur's journey, every leader's challenge, and every person's quest for fulfillment. The reality is that confidence isn't just a nice-to-have personality trait; it's literally a matter of life and death, success and failure, connection and isolation.

When Everything Falls Apart

Let me tell you about someone I'll call "Al"—though to protect his identity, we might as well call him "Al Apart," because that's exactly what his world was doing in April 2015. Picture this scene: Al is holding his newborn son, watching his beautiful daughter play nearby, and his wife is recovering from childbirth. On paper, life looks perfect. The American dream realized—a growing family, a career, hope for the future.

But three days after his son was born, Al woke up to a voicemail timestamped 1:45 AM. Have you ever received a message after midnight that contained good news? Neither had Al. The message was from his father, confirming that Al's mother had just passed away in hospice care.

The irony was devastating. While new life entered the world, another life departed. Al's mother would never meet her newest grandson, and he would never know his grandmother. The timing felt like a cosmic joke—or perhaps a cosmic test.

To understand the full weight of this moment, we need to rewind further. In October 2014, Al's mother had fallen and broken her leg. During her rehabilitation, she discharged herself earlier than recommended—a decision that would prove fateful. On her first day back home, she fell again, breaking her hip. This time, she never returned home. After a series of strokes left her in a vegetative state, the family made the heart-wrenching decision to move her to hospice care.

So there was Al, a new father processing the joy of birth and the grief of death simultaneously, trying to be present for his recovering wife and excited daughter while mourning his mother and questioning every conversation he wished he'd had with her.

But the universe wasn't finished testing Al's resilience. Three months later, in July, he was fired from his job. Here was a man with a preschooler about to enter kindergarten, a newborn requiring constant care, a wife recovering from a difficult pregnancy, and now no steady income. The perfect storm of life circumstances that can either forge a person into steel or break them entirely.

What would you do in such circumstances? If you're Al—and I should mention that Al is actually me, sharing my own story—you do something that might seem completely irrational: you go to Las Vegas.

The week after losing my job, I was scheduled to attend a company conference in Las Vegas. Despite everything falling apart, my wife Sarah and I decided to go. Sometimes when you're drowning, you need to remember what it feels like to breathe. In that Vegas hotel room, surrounded by the artificial lights and manufactured excitement of a city built on dreams and delusions, I made a decision that would define the next chapter of my life.

I decided to burn the boats.

The Entrepreneur's Delusion

Standing in that Vegas hotel room, looking at myself in the mirror—scruffy face, nice suit, but eyes filled with uncertainty—I declared that I would become a "world-class entrepreneur." No more hamster wheel. No more corporate ladder climbing. I was going all-in on building my own financial advisory business.

The problem with confidence, though, is that you can't fake it. You can put on the suit, practice the elevator pitch, and memorize the scripts, but if you don't believe in yourself, everyone can sense it. I was a grieving son, an exhausted father, and an emotionally unavailable husband trying to convince successful people to trust me with their financial future.

Picture me on those Long Island Rail Road trains, traveling to Wall Street each day, having plenty of time to think during those long rides. Too much time, actually. Time to question everything: Who would want to do business with me? What do I really have to offer? Am I just fooling myself?

My prospecting efforts were painful to watch. I'd approach well-dressed professionals at train stations with a rehearsed script: "Hey, you look sharp. Do you keep your career options open? Let me get your business card and invite you to this meeting on Tuesday or Wednesday night." I couldn't even tell them what the meeting was about—how's that for confidence?

The low point came when I found myself prospecting in the baby section of Walmart. I'd pretend to shop for my newborn son while striking up conversations with other parents, eventually steering the discussion toward "keeping your options open." My posture literally reflected my internal state—slumped shoulders, weak handshake, hoping nobody would ask too many questions because I wasn't sure I had the answers.

This is what happens when your confidence bubble shrinks to nearly nothing. We're all born with an abundance of confidence—watch any toddler enter a room like they own the place. But over time, that bubble gets punctured by criticism, comparison, and the countless ways society teaches us to shrink ourselves.

Think about it: when your child first starts talking, you celebrate every word. But eventually, you're telling them to be quiet. When they first walk, you cheer and take videos. Later, you're telling them to sit still. When they first use the potty, you're so proud you practically post it on social media. But eventually, you're telling them they're "pissing you off."

What was once celebrated becomes criticized. What was once encouraged becomes condemned. That's confusing for a developing mind, and those messages accumulate over time until we internalize a voice that says, "Don't be too loud, don't stand out, don't think you're special."

The True Cost of Low Confidence

After months of struggling to build my business while battling internal doubt, Sarah spoke six words that I didn't want to hear but desperately needed to hear: "You have to get a job."

For an aspiring entrepreneur, those words feel like a death sentence. They feel like admitting defeat, like acknowledging that you're not cut out for the big leagues. But sometimes what feels like failure is actually redirection.

The job I eventually took introduced me to a world I'd only observed from the sidelines—professional speaking, coaching, and digital marketing. Suddenly, I was attending conferences, meeting industry leaders, and seeing possibilities I'd never imagined. That "failure" became the foundation for everything I've built since.

But let's talk about what low confidence actually costs us, because it's not just about feeling bad. The impact is measurable across three critical areas: emotional, physical, and financial.

Emotionally, lack of confidence creates a cascade of problems. You can't sleep because your mind won't stop racing with worst-case scenarios. You can't make clear decisions because you're second-guessing everything. You can't connect authentically with others because you're too busy managing your insecurities. When you feel like a failure inside, it's nearly impossible to enroll others in your vision, your products, or your services.

Physically, the impact is equally devastating. Your posture literally reflects your internal state—shoulders slumped, handshake weak, eye contact fleeting. You show up to meetings hoping to be invisible rather than memorable. Your body language communicates defeat before you even open your mouth.

Financially, the cost is perhaps the most concrete. How many promotions have you not pursued because you didn't think you deserved them? How many opportunities have you passed up because you didn't believe you were qualified? How many times have you underpriced your services or accepted less than you're worth because you didn't have the confidence to ask for more?

The real tragedy isn't just what low confidence costs us—it's what it costs the world. When we shrink ourselves, we deprive others of our unique gifts, perspectives, and contributions. Your voice matters not just for your own fulfillment, but because someone, somewhere, needs to hear exactly what you have to say.

The Life-or-Death Nature of Confidence

To understand just how critical confidence is, consider three individuals who appeared to have everything: Kate Spade, the international fashion designer; Kurt Cobain, lead singer and guitarist of Nirvana; and Stephen "Twitch" Boss, the beloved DJ and dancer from The Ellen DeGeneres Show. On the surface, they had fame, fortune, and fans. They looked like confidence personified.

Yet all three took their own lives.

What happened on the inside that the outside success couldn't fix? What internal conversations were they having that led them to believe the world would be better without them? This isn't meant to oversimplify the complex issue of mental health, but rather to illustrate that confidence—true confidence—goes much deeper than external achievements.

Confidence, at its core, comes from the Latin word "confidere," meaning "with trust." These individuals, despite their outward success, had lost trust in themselves, in their worth, in their future. When that fundamental trust erodes, when the confidence bubble shrinks to nothing, people can see no other option but to remove themselves from the equation entirely.

This is why I say confidence is literally a life-or-death issue. It's not hyperbole—it's reality. When we don't believe in our own worth, when we can't trust ourselves to handle life's challenges, when we feel we have nothing valuable to contribute, we're in dangerous territory.

The Foundation: Understanding Your Worth

Building unshakable confidence starts with understanding your worth—not what the world tells you you're worth, not what your bank account says, not what your title suggests, but your inherent value as a human being.

This requires honest self-examination. When I was going through my darkest period, I literally had to journal my way through the pain. I wrote down every self-critical thought, every fear, every doubt. It was like a self-purge, getting all the poison out onto paper where I could see it clearly.

But then came the harder work: self-forgiveness and self-creation. I had to consciously choose who I wanted to become rather than accepting the story I'd been telling myself. This isn't about empty affirmations—telling yourself you have a million dollars when you're broke doesn't work because you can't feel something you don't have.

Instead, it's about identifying the qualities that are already true about you and building on them. I am someone who is kind. I am someone who is thoughtful. I am someone people can depend on. I am someone who has enough resources to make things happen. These weren't aspirations—they were recognitions of existing truth.

The two most powerful words in any language might be "I am." Whatever follows those words becomes your reality. James Allen wrote, "As a man thinks in his heart, so is he." Your words create your reality. If you speak life into yourself, you live. If you speak death, well, there's the other option.

This is where the rubber meets the road. What accomplishment are you most proud of? Not your children—even roaches have kids, as I like to joke—but something you personally achieved that no one can ever take away from you. Something that when life gets tough, you can always point to and say, "Yeah, I did that."

For me, one of those moments came in November 2021, when three other coaches and I decided to organize a one-day event in Arizona. We had 73 days to pull it together—through Thanksgiving, Christmas, and New Year's, during the tail end of the COVID pandemic, when people were still hesitant to gather in large groups.

Our goal was to get 200 people in the room, with proceeds going to pay for a coaching program. But then something magical happened. Our coach, the one we were trying to pay, found out about our plan and made a counter-proposal: "Raise the same amount of money, but donate it all to charity instead of paying me."

Suddenly, the energy shifted completely. Instead of begging people to help me pay for coaching, I was inviting them to support charitable organizations. Instead of "please help me," it became "can you help them?" The weight of self-interest lifted, and something much more powerful took its place: purpose.

We didn't get 200 people. We got nearly 300. That event created a ripple effect that has now spread to multiple countries and raised hundreds of thousands of dollars for various charitable causes, including over \$100,000 for Operation Underground Railroad, an organization that combats human trafficking.

What started as a desperate attempt to pay for coaching became a movement that has literally helped rescue people from slavery. That's what happens when your bubble expands beyond your own needs and encompasses something larger than yourself.

The Power of Intention: Your Bigger Why

The second pillar of unshakable confidence is intention—having a purpose bigger than your immediate circumstances. When you're focused solely on your own needs, your own problems, your own limitations, the bubble stays small and the pressure stays high. But when you connect to something larger, everything changes.

This is about more than goal-setting or vision boards. It's about identifying the crusade you're willing to fight for, the change you're willing to champion, the

legacy you're willing to build. What secret dream have you been too scared to talk about because you think, "I'm just one person—I can't change the world"?

Here's the truth: you don't have to change the world alone, but you do have to speak your vision into existence. Someone spoke the camera I'm using into existence. Someone spoke the internet into existence. Someone spoke every innovation that makes our current conversation possible into existence. It all started with someone willing to say, "What if we could..."

Your word is your bond—but only if you make it so. Most people's words have become inflated currency. They say they'll be there in five minutes and show up in ten. They promise to do something today and deliver next week. They say you can count on them, but they never show up.

What is your word worth? If your word were a currency, would it be gold standard or completely devalued? When you get focused on an intention bigger than yourself, your word becomes your weapon against mediocrity, your tool for creating change, your foundation for building trust.

The event I mentioned earlier succeeded not because we were great marketers or had unlimited resources, but because we were committed to something larger than ourselves. We gave our word to charitable organizations, to attendees, to speakers, and to each other. That commitment created an energy that attracted resources, people, and opportunities we never could have generated through self-interest alone.

Building Your Championship Team

The third pillar of unshakable confidence is your network—the people you surround yourself with, the team you build, the relationships that support and challenge you. This isn't about networking for personal gain; it's about understanding that no champion wins alone.

How many championships did Michael Jordan win by himself? Zero. He had Scottie Pippen, Dennis Rodman, Phil Jackson, and a supporting cast that made the team greater than the sum of its parts. How many Super Bowls did Tom Brady win single-handedly? None. He had coaches, offensive lines, receivers, and teammates who contributed to every victory.

Yet somehow, when it comes to business and life, we think we should be able to do it all ourselves. We wear our independence like a badge of honor, forgetting that the strongest leaders are those who can say three of the scariest words in the English language: "I need help."

Your network should include people who encourage you and people who challenge you. You need cheerleaders, but you also need coaches who will grab you by the face mask and tell you when you're wrong. You need people who see possibilities you can't see and who will call out blind spots you can't recognize.

I'm fortunate to have married someone who serves this role in my life. When Sarah told me I had to get a job, I was furious. It felt like she didn't believe in me, didn't support my entrepreneurial dreams. But she was seeing something I couldn't see—that I needed to develop skills and connections that would serve the bigger vision later.

Sometimes the people who love us most are the ones willing to tell us what we least want to hear. They're not trying to limit us; they're trying to position us for long-term success rather than short-term satisfaction.

Take inventory of your inner circle. Who are you spending your time with? Are they people who are growing, contributing, and challenging themselves? Or are they people who are comfortable with mediocrity and threatened by your ambition? The people you surround yourself with will either elevate your confidence or erode it.

The WIN Formula

When you combine these three elements—Worth, Intention, and Network—you create what I call the WIN formula. It's not a coincidence that these letters spell out "win," because that's exactly what this combination produces.

Your worth gives you the foundation—the unshakeable belief that you have value, that your story matters, that your voice matters. Your intention gives you direction—the bigger purpose that pulls you forward even when circumstances push you backward. Your network gives you support—the team

that helps you see possibilities you can't see alone and holds you accountable to your highest potential.

But here's what most people miss: building a bigger bubble isn't about excluding others or creating an elite club. It's about expanding your capacity to include more people, more possibilities, more impact. It's about diversity of thought, background, and perspective. If everyone in your network thinks like you, looks like you, and agrees with everything you say, you don't have a network—you have an echo chamber.

You need people who will challenge your assumptions, question your methods, and push you to consider alternatives you haven't imagined. You need people who come from different backgrounds, different industries, different worldviews. That's where real growth happens—at the intersection of different perspectives and experiences.

From Scarcity to Abundance

The journey from low confidence to unshakable confidence is really a journey from scarcity thinking to abundance thinking. When I was struggling to build my first business, everything felt scarce—time, money, opportunities, connections. I was operating from a beggar's mindset, asking people to please help me, please buy from me, please give me a chance.

But when I shifted to serving something larger than myself, everything changed. Suddenly, I wasn't asking people to help me—I was inviting them to help causes they cared about. I wasn't selling my services—I was offering opportunities to make a difference. I wasn't networking for personal gain—I was connecting people with shared values and complementary skills.

This shift from scarcity to abundance doesn't happen overnight, and it doesn't happen without intentional practice. You have to consciously choose abundance thinking, even when circumstances suggest scarcity. You have to speak life into yourself and others, even when the evidence suggests death and limitation.

This is where the soft skills that Richard mentioned in his presentation become essential. Empathy, compassion, resilience, emotional intelligence—

these aren't nice-to-have personality traits. They're required skills for anyone who wants to build something meaningful, influence others positively, and create lasting impact.

When you're operating from abundance, you can afford to be generous with your praise, your connections, your opportunities, and your support. When you're operating from scarcity, you hoard everything because you're afraid there isn't enough to go around.

The Ripple Effect of Confidence

Here's what I've learned about confidence: it's contagious. When you show up with genuine confidence—not arrogance, not bravado, but quiet certainty in your worth and your mission—other people feel it. They're drawn to it. They want to be part of it.

That event in Arizona didn't succeed because we had the best marketing strategy or the biggest budget. It succeeded because we believed in what we were doing, we communicated that belief clearly, and we invited others to join us in something meaningful.

The ripple effects continue to this day. People who attended that first event went on to organize similar events in other countries. Organizations that received donations were able to expand their impact. Attendees were inspired to start their own charitable initiatives. Speakers were motivated to share their messages with new audiences.

This is what happens when you operate from unshakable confidence. You don't just achieve your own goals—you create possibilities for others to achieve theirs. You don't just solve your own problems—you contribute to solutions that serve the greater good.

Your Time to Speak Up and Stand Out

As we conclude this exploration of confidence, I want to leave you with this truth: it's your time to speak up and stand out. Your story matters, and your voice matters. The world needs what you have to offer, but only if you have the confidence to offer it.

The journey from "Al Apart"—the man whose world was falling apart—to someone who can stand in front of audiences and share these insights wasn't easy. It required honest self-examination, forgiveness, intentional growth, and the willingness to surround myself with people who believed in possibilities I couldn't yet see.

But if it's possible for someone who was once prospecting strangers in the baby section of Walmart, it's possible for you. If it's possible for someone who was once so insecure he hoped no one would ask him questions at business meetings, it's possible for you. If it's possible for someone who was once told he had to get a job because his entrepreneurial dreams weren't working, it's possible for you.

The question isn't whether you're capable of building unshakable confidence. The question is whether you're willing to do the work required to build it. Are you willing to examine your worth honestly and claim it fully? Are you willing to connect to a purpose bigger than your immediate circumstances? Are you willing to build a network that challenges and supports you in equal measure?

Remember, confidence comes from the Latin "confidere"—with trust. It's time to trust yourself, trust the process, and trust that your contribution matters. The world is waiting for what you have to offer, but first, you have to believe it's worth offering.

Your bubble can expand. Your influence can grow. Your impact can multiply. But it all starts with the decision to speak up and stand out, to trust your worth, to commit to your intention, and to build your network.

The choice is yours. The time is now. Your story matters, and your voice matters.

When we speak up, we get to stand out.

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