LEADING with BACKBONE and HEART
How to Increase Leadership Maturity

Mary Beth O’Neill and Roger Taylor

LEADERSHIP ALIGNMENT CYCLE
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Leading with Backbone and Heart is fundamental to the leadership practices in the Leadership Alignment Cycle: it guides you to increase your Leadership Maturity, which you will need to be successful at the other practices around the Cycle. And, as you focus on the interactions that produce the most creativity and productivity with your team, you take advantage of huge opportunities for everyone’s success and satisfaction that most leaders miss.

Welcome to Leading with Backbone and Heart, one of two products in the Leadership Maturity section of the Leadership Alignment Cycle. It describes how to balance two aspects of your leadership that enhance the interaction dynamics that go on between you and your team.

Leading with Backbone and Heart will dramatically enhance any of the Leadership Practices in the Leadership Alignment Cycle. Each of the Leadership Alignment Cycle practices includes a section that outlines the specific backbone and heart leadership challenges customized to that activity, and how to address them.

We each have worked over 30 years as executive coaches and leadership consultants to executives in Fortune 500 companies in a variety of industries. We help leaders both to mobilize their teams and to get results. Many leaders have not figured out how to integrate this double mandate. Leading with Backbone and Heart is one of a suite of tools called The Leadership Alignment Cycle that supports leaders to do just that. We call that suite the Leadership Alignment Cycle and we have helped leaders use these tools to great effect.

Over several decades, we encouraged and witnessed the interaction patterns that create success. We have discovered -- with our clients -- the reliable and repeatable interactions between a leader and team that boost productivity, engagement, commitment, and results.
By working the elements of the Leadership Alignment Cycle, you take advantage of huge opportunities for everyone’s success and satisfaction that most leaders miss.

The quality of a leadership team's alignment is the most influential factor in determining their organizational results. As a leader, you and your organization are best served by ensuring that your leadership team is completely committed to deliver results, address opportunities and problems that interfere with progress, and create a culture where alignment is valued.

ALIGNMENT - THE KEY TO SUCCESS AND SATISFACTION

The Leadership Alignment Cycle is a sequence of ground-breaking leadership practices that can:

- Accelerate breakthrough results
- Reduce confusion, conflict, and wasted effort
- Increase value and satisfaction of meetings and interaction
- Provide a framework for leadership development
- Transform the culture of the organization

The Leadership Alignment Cycle is a set of groundbreaking interaction practices that guide leaders to address alignment as they –

- Create a leadership vision
- Address team reservations and commitment
- Coordinate departments
- Cascade alignment throughout the organization
- Develop talent and performance

The Leadership Alignment Cycle activities rely on the following principles:

1. Leadership activity must be oriented toward tangible results.
2. Leaders must lead, and teams must influence within parameters of desired outcomes
3. Success depends on getting everyone working together in the same direction
4. Leading with maturity promotes both results and satisfaction
5. Interpersonal skill and emotional intelligence are prerequisites
6. Personal development never ends for leaders
7. Authority is a resource, neither a weapon to be wielded nor a danger to be avoided.

8. Leadership practices cannot occur by email; they require live interaction.

At each step along the way, alignment means getting the horses pulling in the same direction, and this often means addressing both conflict (managing different perspectives) and authority (managing who decides), as you work to achieve results.

Conflict and authority are often thorny topics that people (and leaders!) avoid, precisely because they don’t have a reliable way to navigate the dangers. After enough painful failures, leaders often avoid the risks altogether. They know this evasion costs them progress, but the threat of getting into trouble with others can be too much to face.

These leadership practices will help you guide your team through these hazards, building resilience along the way. As we mentioned earlier, what is most often missing when leaders fail is the thoughtful use of interaction practices as leaders accomplish these important tasks with their teams.

Great leaders have a clear perspective on the need for effective interaction to achieve results in their organization, as well as what constitutes both effective and ineffective interaction. Their images of great and poor interaction drive what they pay attention to with their team and how they intervene as leaders.

**LEADERSHIP MATURITY**

In order for any leader-team interactions to be successful, they require you to bring authenticity and rigor to your leadership. From our experience, leaders face four consistent choice points which, if they exercise maturity, they can deliver outstanding results. You will find that the Leadership Alignment Cycle tools stretch you to develop your Leadership Maturity, which deals directly with the following four choice points.
The Leadership Maturity choice points are --

- Face vs. avoid leadership challenges
- Use vs. abuse or refuse authority as a resource
- Integrate vs. separate leadership maturity, team functioning, and results
- Shift vs. tolerate unproductive interaction patterns*

* NOTE: The 4th choice point – shift vs. tolerate unproductive patterns – is actually an important integrator of the first three choice points of leadership maturity, as well as an especially powerful determinant of team development and business results. Leaders who tolerate unproductive patterns are by definition not leading with backbone and heart - avoiding leadership challenges, abusing or refusing authority as a resource, and separating leadership maturity, team functioning, and results. We have found over and over, that when leaders shift unproductive leader-team patterns by facing leadership challenges, using authority as a resource, and integrating a triple mandate -- leadership maturity, team functioning, and results -- results and team satisfaction skyrocket.

Leadership maturity drives alignment, and alignment drives outstanding results. This requires transforming how you show up to lead. The secret to leadership maturity is how well you embody and balance “backbone and heart”® as you face the four choice points with your team. As a leader, you are challenged to: 1) choose your stance, AND 2) value other's interests as much as your own, and then 3) use your authority to decide or delegate appropriately, and ensure that other's resolve their reservations to commitment. What is most often missing when leaders fail is the thoughtful use of this kind of direct interaction as a practice. Only through these mature interactions can you address important issues of conflict and authority, and create committed, well-coordinated leadership teams that cascade that alignment throughout the rest of your organization.
TO EXERCISE LEADERSHIP MATURITY - LEAD WITH BACKBONE AND HEART® AND SHIFT LEADER-TEAM PATTERNS

If you want people to do things they haven’t done before, or function in ways that are new to them, then you need to demonstrate two complementary ways of being with them: 1) clear resolve about your expectations, and 2) support to navigate the natural disruption that the change is creating for them. You have to lead with backbone and heart.

**Backbone** is having the nerve to --
- Choose your course, especially in controversial situations
- Take a clear, non-anxious position with others about your goals and expectations,
- Either hold your position even when people are anxious about your decision, or choose to be influenced by other's positions because you think it serves the outcomes best.

**Heart** is having the nerve to --
- Be interested in others’ positions,
- Encourage others’ interests and participation, and
- Invite their participation both when they agree and when they disagree with you.
- Empathize with their frustration and disappointment when you decide against their interests

The problem comes if you sacrifice either backbone or heart to manage your anxiety in challenging leadership situations. That sacrifice is an instinctual, though ineffective, response to anxiety - one that you can override with emotional resilience, intention, and mature interaction.

Rather than forfeit your backbone in order to preserve relationships, abandon your heart in order to preserve your stands and positions, or relinquish both in order to preserve the status quo even though the consequence is no progress, you can hold on to both, withstand the anxiety of the unknown, and discover the power and calm that comes from demonstrating a strong balance of backbone and heart.
If you can be insistent without being domineering or cold, and if you can be supportive without taking away your team’s challenges or opportunities, you are leading with backbone and heart and demonstrating your leadership maturity. In this tool, there is a table of backbone and heart challenges that are specific to creating a Leadership Vision, with suggestions on how to address them.

**Shifting Patterns**

One of the ways to bring backbone and heart to your leadership is to make sure that you shift patterns of interaction that interfere with success. Patterns are habits, and as such are both familiar and unconscious. Leaders need the stamina and curiosity to identify unproductive patterns, create more productive habits, and manage the natural disturbance that change provokes. Pattern shifts require you to increase your backbone and/or heart. We have never seen it otherwise. That is why knowing how to shift patterns you participate in is a subset of increasing your backbone and heart.

Since patterns are so often invisible to the people in them and need a special awareness to see them, we have a separate tool that shows you how to shift patterns between you and your team. You can find it in the Leadership Maturity section of the store at www.mboExecutiveCoaching.com.

**THE COST OF LOW BACKBONE AND HEART**

Avoiding a leadership challenge always involves a lack of backbone, a lack of heart, or a lack of both. We have never seen it otherwise. When you avoid leadership challenges, you are more likely to limit your growth as a leader, and hold back the full potential of your team. This makes it difficult to impossible to reach the bottom line results you need to achieve. If you do achieve those results, they can be at the cost of morale, productivity, and optimal organizational functioning.
**The Cost**

1) Limited growth as a leader
2) Your team is held back from their full potential
3) Lower morale, productivity, and organizational functioning
4) Missed business targets

**THE ROI OF HIGH BACKBONE AND HEART**

First of all, the leaders who bring both resolve (backbone) and empathy (heart) to their leading are effective and respected as leaders. Secondly, it improves their ability to bring about impressive bottom line results for their organizations. Leaders who have the resolve to see a goal through while being truly interested in their team’s perspective are not only good leaders, but they get noticed because they get results.

**The ROI**

1) Increased productivity
2) Achieved business targets
3) Sustained team cohesion and bottom line results with subsequent challenges
The overall challenge of backbone and heart, in each of these leadership practices, is the need to bring both the resolve to accomplish goals and your interest in others while you accomplish the tasks of each practice. Here is a list of the ways that you need to bring both backbone and heart to each leadership practice in the Leadership Alignment Cycle. These challenges are simple to understand but not always easy to execute.

<table>
<thead>
<tr>
<th>LEADERSHIP PRACTICE</th>
<th>WHAT TAKES BACKBONE</th>
<th>WHAT TAKES HEART</th>
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</table>
| Create a Leadership Vision | • Choose the key team cultural pattern that needs changing.  
  • Withstand your team’s discomfort with change. | • Be open to what the team needs from you so they can perform at their best. |
| Gain Leadership Team Alignment | • Weigh team’s reservations & decide which ones need problem-solving & which need to be moved to action. | • Listen to the team’s reservations with respect and compassion. |
| Ensure Leadership Team Coordination | • Require team members to be peer colleagues, creating together the strategies for the organization’s success.  
  • Set parameters for coordination, not leaving it to chance. | • Show appreciation for the team when they offer resources to each other rather than grab turf. |
| Guarantee Cascading Alignment | • Create a standing agenda with each team member to track how they are getting their teams aligned. | • Listen closely for the challenges your team faces in managing the commitment of their teams, and coach them through the challenges. |
| Conduct Performance Management | • Clarify and stay with performance expectations.  
  • Enact consequences. | • Understand the confusion, inability, or lack of confidence of the team member or the team as a whole. |
As we mentioned earlier, backbone and heart requires you to bring your leadership maturity in these ways: face challenges, use authority effectively, shift unproductive patterns, and keep your leadership, team alignment, and achieving results well integrated. With all that riding on your ability to bring resolve and empathy to critical situations, it may be useful to look a little more deeply at the dynamics at play in balancing backbone and heart.

**TWO BASIC DRIVES: BACKBONE AND HEART**

Humans have two basic drives that are complementary. But in the tumble and relational stresses of every day life, they can seem opposed to each other.* One drive is for autonomy -- to define oneself, to differentiate between what one thinks, feels, and wants from what others think, feel, and want, to have the ability to create goals and to see them through. We call this drive backbone. A person with this kind of autonomy can change their position, not because they feel pressured to change (either from the inside or the outside), but because new information has come to light.

The other drive is to belong -- to connect with others, to affiliate and be included in and a part of creating the human community, to show understanding, finding out what life is like for someone else, and to express compassion. We call this drive heart.

To be an emotionally intelligent and successful leader, you have to be aware of these two basic human drives and bring them into your leading. However, each of us can have low or high ability to express either of these drives. Let’s look at these drives a little more in depth. For a shorthand way to refer to them, we’ll call the drive for autonomy, self-definition, and the drive for belonging, connection (see figure below).

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* Our approach to these two relational drives is influenced by the work of Murray Bowen with his theory of self-differentiation, and the subsequent work of Edwin Friedman.
THE TWO BASIC HUMAN DRIVES

High Self-Definition

High Connection to Others

Low Self-Definition

Low Connection to Others
INCREASING LEVELS OF SELF-DEFINITION

Here are examples of what low and high self-definition can look like. As you can see, the more developed the person’s ability is, the more clearly defined they are to themselves and to others. They have the determination to establish goals, describe those goals to others, and stay the course even when things do not go smoothly for them.

High Self-Definition
(Backbone)

I commit to my position and can maintain it, even when I receive rash, unthinkable opposition to it.

I know what my position is and say it, but I don’t maintain it when questioned.

I know what my position is, but I don’t say it.

I don’t know what my position is yet; I’m considering a variety of alternatives and viewpoints.

I take on others’ positions as my own.

Low Self-Definition

You can see that it would be hard to create a leadership vision, get leadership team alignment and coordination, cascade alignment throughout the organization, and do effective performance management -- all Leadership Practices of the Leadership Alignment Cycle -- if you were low on this scale, because there would be no clarity about where you stand, and no one would know who, what, or how to follow.

INCREASING LEVELS OF CONNECTION TO OTHERS

Here are examples of what low and high connection to others is like. As you can see, the more developed the person’s ability is, the more connected they are to others. They have the humane ability to reach out to others, show that they understand their world, and join with them in a common agenda.
You can see that it would be hard to create a leadership vision, get leadership team alignment and coordination, cascade alignment throughout the organization, and do effective performance management -- all Leadership Practices of the Leadership Alignment Cycle -- if you were low on this scale, because no one would feel involved or connected enough to follow you.

PUTTING THEM TOGETHER
Even though we have pulled them apart as though they exist separately, these two drives constantly interplay during an interaction. Ideally, if someone had high self-definition and high ability to connect, they would be exceptionally effective in work relationships and leadership, including all the practices in the Leadership Alignment Cycle (they would appear in the upper right corner of the following graph). Both abilities -- to define oneself and to connect with others -- are needed to be productive in life and in leading.
This graph depicts an example of a person who maintains both backbone and heart during the full course of an interaction.

![Goal of Backbone and Heart Relating](image)

Actually, when relating to others, many times we range all over this territory. For example, we may be able to define ourselves but show little empathy for others. Or we may be strong on compassion for others but not well defined ourselves. Or we may be low in both.

**YOUR SIGNATURE TENDENCIES**

When we experience stress because of competing priorities -- for example, people wanting us to respond in ways that will disappoint others -- we revert to habitual responses that give up satisfying one of these drives for the sake of the other. These two drives are often in tension and experienced as competing energies: if I connect with you, will I have to give up a part of me? Or, on the flip side, if I define myself, will you reject me? When you focus on one drive, the other can be neglected, your relationships suffer, and your effectiveness lessens.
We all have signature tendencies during stressful interactions with people, and these can come out during the Leadership Practices. Since the Leadership Practices require you to be both well-defined in your point of view and well connected to others, it is important to know when you are vulnerable to the pressures that pull you out of balance, and which Leadership Practices are easier than others to express your stands and positions (backbone) and your curiosity and empathy (heart). As with everyone, at your most anxious, you may be neither self-defined nor connected to others during a Leadership Practice. Then you will be in the lower left part of the graph below:

![Diagram](image)

When this happens, it can be useful to know how to characterize your reactions so you know how to return to clear and connected communication. The following quadrants can help you discover how you express both low backbone and low heart -- which quadrant you go to when you let go of self-definition and connection because of internal or external stresses that affect how you express those drives. Take a look at the descriptions of the various quadrants and see where you go when you are not at your best when you relate to others.
Expressing Both Low Backbone and Low Heart

This circle with four quadrants shows four different ways of being in the low backbone/low heart position. The Rigid / Vague axis relates to extreme ways to be low in backbone. The Distant / Over Attentive axis refers to the extreme ways to be low in heart. At first it may seem strange, for example, that Rigid would be as low in backbone as being Vague. Remember, however, that these are basic human drives, and when they are not expressed healthfully, they can go in extreme directions and still not be sound ways to express them. You can express too much or too little of each drive. It is comparable to our hunger drive; both too much eating and too little eating can result in low nutrition.

To give you a sense of how these extremes are expressed, here is a table that describes actions you may take when you are low in both backbone and heart, as they are expressed in each quadrant.
## When Both Backbone and Heart Are Low:

<table>
<thead>
<tr>
<th>Quadrant</th>
<th>Low Backbone and Heart</th>
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</table>
|          | **Distant (low heart)**  
You disconnect from others in some way;  
**AND**  
**Rigid (low backbone)**  
You insist on your position, even when new information comes to light. |
| 1        | **Rigid (low backbone)**  
You insist on your position, even when new information comes to light;  
**AND**  
**Over Attentive (low heart)**  
Your actions are guided by ensuring that people do not get uncomfortable or upset with you. |
| 2        | **Over Attentive (low heart)**  
Your actions are guided by ensuring that people do not get uncomfortable or upset with you;  
**AND**  
**Vague (low backbone)**  
You do not state your position, what you think/feel/want. |
| 3        | **Vague (low backbone)**  
You do not state your position, what you think/feel/want,  
**AND**  
**Distant (low heart)**  
You disconnect from others in some way. |
Here are short mottos to help you remember what you need to do when you find yourself needing to increase backbone or heart in your relationships.

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<th>2 WAYS TO IMPROVE BACKBONE</th>
<th>ATTITUDE</th>
<th>ACTION</th>
</tr>
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<tbody>
<tr>
<td>When Rigid</td>
<td>Let go of your certainty</td>
<td>Get curious about others</td>
</tr>
<tr>
<td>When Vague</td>
<td>Step forward and be seen</td>
<td>Clarify your position and tell others</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>2 WAYS TO IMPROVE HEART</th>
<th>ATTITUDE</th>
<th>ACTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>When Distant</td>
<td>Get in touch with your compassion</td>
<td>Show it</td>
</tr>
<tr>
<td>When Over Attentive</td>
<td>Honor your needs</td>
<td>Set limits on your accommodation to others</td>
</tr>
</tbody>
</table>
DEVELOPING YOUR BACKBONE AND HEART

Can you see yourself in one of the four quadrants when you are anxious about a situation, when you feel these two drives competing in you? If so, that is great. If not, you may ask others who know you well which quadrant they see you in. Everyone loses balance at one time or another. No one is immune. It is important to know the quadrant you go to when under stress, before you can find your way back to more balance. The following section is a way to further develop your backbone and heart, followed by four mottos that can help you while relating to others.

In each of the leadership practices of the Leadership Alignment Cycle, you will find a section that helps you address your challenges to lead with backbone and heart that are specific to that particular practice. Those sections will include worksheets that help you identify three key areas of backbone and heart development that will guide you from reflection to action: 1) notice what you avoid, 2) face and plan a more mature way to respond, and 3) take action and evaluate results.

Below is how you can think about and approach each of these three areas.

NOTICE WHAT YOU AVOID

a) Notice your reactions to a specific situation. Give yourself credit for what you are facing in this situation. Then clarify which part of the backbone and heart balance you have left out -- clarity and resolve about your position, and/or being interested in others’ points of view. Notice especially what makes you anxious or uncomfortable about the situation. Anxiety is a doorway to being able to face the challenge more effectively, so get to know it.
b) **Clarify how this avoidance has both served you and hampered your progress.** Identify what benefits you receive from not addressing it head-on. There are always benefits; otherwise we would not keep doing it. Clarify what thoughts, preferences, feelings, and actions did you either suppress or impulsively act on, that made it easier for you to avoid taking on the real challenge.

c) **Decide if you’re willing to choose progress** (and the more intense anxiety that comes with it) over avoidance (with its tolerable anxiety, but weakening of your maturity). Take into consideration the factors surrounding your decision -- deadlines, political realities, resources -- in a way that informs your decision without driving it, where you choose your battles without avoiding them. If you choose progress, prepare the rationale you will use (at least with yourself) to tolerate any uncomfortable feelings long enough to notice the improved results you want.

### QUESTIONS TO ASK YOURSELF:

1) *What is uncomfortable about this situation? Examples are: confrontation, conflict, or disapproval with or from others, or doubt, confusion, or anxiety in yourself.*

2) *How would you assess your backbone in this situation -- Overly Rigid ------------- Clear and Resolved ------------ Overly Vague? What actions have you taken or not taken that confirms your assessment?*

3) *How would you assess your heart in this situation. Overly Distant -------- Interested & Empathic ------- Overly Attentive? What have you done or not done that confirms your assessment?*

4) *Are you ready to give up the known benefits of avoidance to face the challenge? Examples are: keeping the peace, staying independent vs. interdependent with other departments, or relying on natural consequences rather than stepping in to change course.*

5) *What would you gain by giving up those benefits? What are other implications to consider before leaning into this challenge?*
FACE AND PLAN A MORE MATURE WAY TO RESPOND

a) **Identify what the real challenge is that you need to face.** Reframe the issue as less “about them,” and more about what you need to bring to the interaction when you are with them.

b) **Identify what attitude you need to shift as you lead differently.** When shifting attitudes and behavior, it’s always about either more backbone and/or more heart. Examples of attitude changes are: letting go of your certainty...or not giving up on your position too soon… or warming up to others’ viewpoints...or believing that your needs count.

c) **Clarify what you are going to say and do, behavior changes** you will make to interact differently.

d) **Prepare for internal and external resistance** to your plan. Imagine how others may respond and decide how to respond to those reactions if they come. Prepare a response that acknowledges their concerns, AND clarifies whether you are influenced to change your expectations or not.

**QUESTIONS TO ASK YOURSELF:**

1) If you face and deal with this challenge, what is going to be hard to do or say differently, and with whom?

2) What new attitude do you want to bring to this situation and with whom?

3) What do you need to do, to convey this attitude and to turn the situation around?

4) How will others respond? How will you respond to those reactions if they come?

5) How could you sabotage your plan (e.g., be too controlling, lack of curiosity, withhold your true position, cave in to others’ nervousness)? Decide how to respond to those possibilities.
TAKE ACTION AND EVALUATE RESULTS

a) **Enact the attitude and actions you planned to take.** Course correct if necessary. Give yourself time during the interaction; pause if you have to, to reconnect with your new attitude and goals.

b) **Evaluate your actions based on how closely you held to your desired outcomes.** Assess whether you stayed with your goal during the interaction, even in the midst of triggers that, in the past, would have thrown you off course and sabotaged your plan. Or you might have stopped short of using new behavior.

You may find yourself undergoing gradual changes, each time getting closer to behaving the way you want. Update your attitude and plan as necessary. If you need to increase your natural rate of change because your team needs that from you, it would be useful to talk to a third party afterwards to debrief your experiences from the interaction, and get help to plan your next step.

**QUESTIONS TO ASK YOURSELF:**

1) To what extent were you able to remain aware of your goals throughout the interaction? Which goals did you enact and which did you let go of? What motivated you to let go of any of them?

2) What reluctance, intense feelings, or strong judgments did you notice yourself having as you were saying and doing unfamiliar things? Do you want to change how you expressed (or didn’t express) any of them?

3) Are you shifting your response at the rate that this situation calls for?

4) If not, what person could be a resource for you -- to debrief and plan your next actions -- to accelerate your pace of change?
THE BAD NEWS
As we’ve discussed, just because we have these two drives -- to define ourselves and to connect with others -- doesn’t mean that we are skilled in expressing them. You really have to focus your attention to express them well. Added to this is the extra complexity of being in a role of authority and people’s reactions to their own and your authority. How you relate to your role authority, and your skill in expressing both self-definition and connection with others, is a complex challenge that needs to be consciously managed.

Even though it is essential for leaders to guide their teams through the emotional challenges of change, not everyone with management authority is up for providing this kind of guidance. This makes it less likely they will successfully lead a change in their organization. They mistakenly believe it is not their job. That’s a big problem. They are ignoring it at their peril. It can result both in a failed change and a failure of leadership.

THE GOOD NEWS
You can get better at expressing these two drives. When you are able to do both at once – define yourself while connecting with others – your effectiveness as a leader soars. Over and over again, we have seen leaders increase their ability to express self-definition and connection simultaneously, which also results in their ability to bring about impressive bottom line outcomes for their organizations.

Backbone and heart competence is not about being perfect all the time. It might feel clumsy at first and require stamina to develop the drive you cannot do without becoming reactive in some way, but it can be done. It is recognizing when you have lost self-definition or connection, knowing how to regain it, and shortening your reaction time to regain your ability to articulate your positions and show empathy to others while in the same conversation.

As we mentioned earlier, no one is mature enough to express these two drives well 100% of the time. But the more leaders bring both of these relational abilities to their leading, the more effective and respected they are as leaders. And when they inevitably fall out of
balance, it is important to recover and rebalance quickly, or their leading, their teams, and their business outcomes will suffer.

WHAT TO DO ABOUT IT

First of all, you will spend less time managing others and more time managing yourself. You will pay attention to your actions, to see if you have defined yourself and your goals clearly, and whether you have reached out to others to engage with and influence you. You will begin to see that when you do not bring clarity of your positions and empathy, you give up some level of self-definition or give up some amount of connection to others. You will have to face the leadership challenge of managing yourself in this a new way.

This comes into play every time you are confronted with any of the results you are working toward. For example, when deadlines on business goals are routinely missed, do you focus on your team’s actions, their lack of urgency and/or the absence of their cross-division coordination? Or do you reflect on how you have been unclear or disconnected from them? The leverage for change is not to look for what your team can do differently, but to look for what you can do differently with them.
SELF-ASSESSMENT
LEADING WITH BACKBONE AND HEART

This assessment is organized around two of the most challenging areas for leaders: exercising authority and managing conflict, two areas that are likely to arise during any leadership practice, including those addressed in the Leadership Alignment Cycle. It is less about your innate character than about what you do in the give and take of interacting with others, especially when you and/or others are anxious about the circumstances.

Think about a specific situation that was challenging between you and your team, and rate yourself below with that situation in mind. Rating yourself a “6” means you did the item well every time it was necessary, including during this stressful situation.

**AUTHORITY**

1) (Backbone)

6 = You know what you want your team to achieve, and why it's important for the organization.

2) (Backbone)

6 = You hold others accountable to achieve the necessary outcomes. You do not change expectations just because others are nervous.

3) (Heart)

6 = You consider others’ perspectives about goals and activities, whether they are different from yours or not.

4) (Heart)

6 = You invite others to influence you, and let them know if/how they influenced you.
5) (Backbone)

6) (Backbone)

7) (Heart)

8) (Heart)

6 = You know where you stand on issues when you have a difference with others.

6 = You clearly articulate your positions to others.

6 = You spend time to consider the thoughts, feelings, and motivations of people with whom you disagree.

6 = You reach out to others with interest and compassion, and acknowledge the merits of others’ points of view, even when in conflict.
RESULTS OF SELF-ASSESSMENT

**Questions 1, 2, 5 & 6 have to do with backbone:**
Knowing, articulating, and acting on your positions.

**Questions 3, 4, 7 & 8 relate to heart:**
Showing interest, understanding, and connecting with others, also acknowledging their contributions.

You may be high in both backbone and heart, or you can be high in one and low in the other, or low in both.

If you answered --

**Mostly 1s and 2s on all questions:**
Kudos for your honesty. Now it’s time to lead your team in a different way. People will thrive when you interact with them in the ways mentioned in the self-assessment that they aren’t already getting from you. Prioritize learning how you can improve your backbone and heart leadership. Results and satisfaction will follow.

**Mostly 3s all questions**
Okay, so you’re not consistently stellar in this department. You may do well sometimes and not at other times. It’s good that you know it. Become a keen observer of yourself, when you do and when you do not give clear positions and/or remain open to what others think, feel, and want. Chances are there are situations that leave you less able to do both when doing both is how to lead effectively.

**Mostly 5s, and 6s on the backbone questions:**
This is great. You are, for the most part, able to clearly state your positions, and hang on to them when it’s needed, and change them when new information leads you to do so.

**Mostly 5s, and 6s on the heart questions:**
This is great. You are, for the most part, able to stay connected to your team in a way that allows them to participate and feel the value of their contribution on any given issue.

**Mostly 5s and 6s on all questions:**
Congratulations. You are, for the most part, able to clearly state your positions, hang on to them when it’s needed, while staying connected to your team in a way that allows them to participate and feel the value of their contribution on any given issue.

Now that you have assessed where you are, you can use this orientation to help you bring more backbone and heart to your leading. It’s important to look at specific situations so you can course correct them. We suggest you bring this way of assessing your leading to each of the leadership practices along the Leadership Alignment Cycle, especially when you experience your responses thwarting your best efforts to lead.
We offer a range of resources and services to support you in developing your capacity and skill in leading with backbone and heart.

**TOOL FOR YOUR USE**

- This Leading with Backbone and Heart orientation deepens your own understanding of what is required to lead a team through the practices of the Leadership Alignment Cycle, including the key interactions among people that will get you to your outcomes.

**TOOL FOR YOUR ORGANIZATION**

- Get Leading with Backbone and Heart for your whole organization, so that you can get everyone informed and invested to understand, use, and improve their balance of being clear with their positions and connected in their empathy with others.

**1-1 CONSULTATION**

- We provide individual consultation and coaching to help lead with backbone and heart.

**TEAM COACHING**

- We can help you and your team lead with backbone and heart so that your organization achieves the outstanding results.

- We provide consultation and coaching for you and your team as part of learning to implement the entire Leadership Cycle more effectively to make dramatic progress on all your strategic priorities.
BIOS

Mary Beth O’Neill

For over 25 years Mary Beth has coached a range of leaders, from CEOs, to senior vice presidents, directors, and senior managers, including those in Fortune 100 companies. She works with executives and their teams as well as 1-1 with leaders. Her passion and specialty is to help clients leverage their interactions with their teams to produce bottom line business results.

She leads the Executive Coach Training Series for experienced executive coaches, organization consultants, and HR professionals. Mary Beth also trains, coaches, and consults with internal OD/HR departments who are developing coaching cadres for their organizations and want to apply a consistently systemic coaching approach with their internal executive clients.

She has been a graduate faculty member for 23 years in the master’s program in Leadership and Organization Development at the Leadership Institute of Seattle (LIOS), at Saybrook University.

Mary Beth’s book, Executive Coaching with Backbone and Heart, is a classic in the field and a textbook in many coaching schools. It has been translated into 5 languages.

Roger Taylor

Roger Taylor has been studying leadership and coaching leadership teams for almost 30 years. As a strategic leadership consultant, he has coached at all organizational levels—from the C-Suite and Executive teams to front line work groups – in organizations across corporate and public sectors, including Fortune 500 and 100 companies.

Roger has extensive experience with large-scale organizational learning and leadership development programs; consulting and live-action coaching for intact executives leadership teams, facilitating strategic alignment and cross-functional coordination, change management, intense conflict resolution, and building cultures of performance, accountability, and emotional resilience.

He focuses on developing leadership maturity, organization alignment, and outstanding results. Roger’s specialty is working with leaders to prepare for and succeed in live business situations where cultural dynamics threaten true progress.

He taught graduate-level leadership, consulting, and coaching at the Leadership Institute of Seattle, and has created numerous models on leadership and coaching.