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# Leadership Retreats

How Leaders Can Create Active and  
Engaging Learning Opportunities

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*Very* Good things are happening here

## Introduction

Leadership matters. Like all organizations that aspire to achieve and sustain exceptional results, we take leadership training seriously at SOMC. And we understand that our leaders can only become successful and improve if we provide them with the experience, training, and support they need to continuously improve their leadership skills.

For many years, SOMC did what most organizations do. We brought in expert consultants to give inspiring educational talks. We offered a variety of leadership classes on the topics our leaders requested. And we sent leaders to national leadership conferences where they attended more classes and listened passively to more experts. Still, we were not entirely satisfied with the leadership results that these traditional leadership learning activities produced.

So, we decided to try to find A Better Way (ABW). Using this simplified process improvement methodology, we engaged several of our highly-motivated leaders in designing an improved SOMC Leadership Learning Plan (LLP). We began our work by identifying our goals and the flawed elements in our current leadership development process. After a great deal of brainstorming and experimentation, we succeeded in designing and deploying a comprehensive LLP based on the brain sciences and active learning strategies. Our leaders enthusiastically embraced their new process, and our organizational results are improving. The SOMC white paper that follows describes one key element of our LLP—the SOMC Leadership Retreat. These quarterly retreats have now replaced our more expensive trips to national leadership conferences. SOMC leaders prefer these leadership retreats and consistently report that our customized retreats are much more engaging and productive. I encourage our blog readers to join the ongoing conversations about improving each learning element in our SOMC Leadership Retreat process. I also hope that readers outside SOMC who are considering designing their organization's customized leadership retreats will find our structures and functions valuable assets in their planning and execution.

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## Identify Opportunities for Improvement

Leaders routinely fail to appreciate the inertial power of the status quo. Our brain programming compels us to keep doing what we are already doing, even when we could be doing something better. And we are more likely to continue engaging in ineffective leadership learning activities if everyone else is doing the same thing.

Every moment of boredom, irritation, and disengaged distraction while traveling to, from, and attending a leadership conference indicates an opportunity to improve the learning experience. The exorbitant costs of brand name conferences should give every leader pause. But the most significant reasons to design a better way are the typical complaints about the paucity of value-added takeaways and the absence of meaningful behavioral change after the conference.

**Stop ignoring the clues.** When you remind yourself and others that some leadership conference frustration “is just the way it is,” remind your brain to call BS on this excuse. Things are just the way they are because we are too lazy to challenge and change them.

**Identify the strengths and weaknesses of the current leadership development activity.** Make this engaging activity the project for your next working meal. Be sure to use the brainstorming tool effectively and arrange for someone to take notes.

**Brainstorm options and implement the best one.** There are always options, and there is always the best option. Remind yourself and others that making a change and sustaining it will be more challenging than you presume. People like to travel to lovely places and be intellectually lazy while there. Engaging in active learning instead will not thrill the hearts of most leaders.

## Clarify the Retreat Goals

Because retreat leaders want so many good things to happen at their conferences, they may find it hard to focus on the most important goals. They want their colleagues to feel recognized and rewarded for their work, and they want them to have a good time. Retreat leaders expect participants to build and strengthen relationships and, oh yeah, they surely hope everyone will learn something.

Do you see how easily retreat facilitators can miss the most important goal? If participants do not permanently change at least one of their ineffective leadership behaviors to more effective interventions, it was only an enjoyable business entertainment occasion.

**Focus on changing leaders' behaviors.** Learning something new can be fun, but making a significant behavioral change based on what you've learned is neither easy nor fun. It's hard work.

**Identify leaders' underlying destructive beliefs.** The most effective way to change behavior is to change the assumptions the leader's brain used to create the feelings that compelled the leader to behave ineffectively. This work is the hardest part.

**Help leaders improve their leadership skills.** Leaders can only build and strengthen their leadership competencies by changing their less effective leadership beliefs and behaviors—despite how they feel.

## Demonstrate Executive Engagement

“What is your most significant barrier in improving the leadership culture in your organization?” Ask this question at the coffee break of any national leadership conference, and the answer will usually be, “It's the executives. We can't get them engaged. We can't do it without their support.”

It's true. Executives set the tone for their organizational cultures. If you've spent much time around executives, you've undoubtedly observed that many of them have embraced their own tribal cultures to emphasize how different and special they are. These destructive beliefs incline these foolish bigwigs to engage in aloof entitlement behavior, undermining the egalitarian teamwork essential to effective leadership role modeling.

**Insist that executives attend the retreat.** By their presence, executives send a strong signal to other leaders that they expect ongoing leadership development by every leader.

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Executive attendance is necessary but insufficient. Misguided executives frequently hire a retreat facilitator to remain free to step out and respond to their “important” texts and phone calls. What could be more critical for an executive than leading by example?

**Insist that executives participate in the retreat.** Attending and leading is still not enough. Executives must do the same work and demonstrate the same engagement they expect of others. This requirement means they must write and give their own presentations and remain actively engaged in group discussions.

## Select Participants Intentionally

As expected, every organization employs leaders who view leadership retreats as meaningful opportunities and are eager to attend and engage. And others view these retreats as a waste of time and money and would rather stay home. Most leaders would prefer to participate with their friends instead of spending time with strangers from a different departmental tribe.

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**The only evidence-based way for leaders to overcome their tribal instinct is to collaborate with other tribe members by finding and building on their common ground and working together toward a common goal.**

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Inviting a diverse group of leaders who rarely get to work together and know each other only superficially creates an energizing discomfort. While a large group of grouching naysayers would poison the melting pot, a sufficient number of critics will increase the likelihood that someone will speak the truth during the retreat. And, as you've heard, the truth will set you free. Not infrequently, cynics become believers in the process.

**Clarify your expectations.** Make it clear that you expect every leader to attend at least one leadership retreat as a condition of remaining on the company's leadership team. Remind hesitant leaders their primary obligation is to persuade themselves and others to do what needs to be done—despite how they feel. Here is another opportunity to do so.

**Select prepared leaders.** These retreats are intense and demanding. Most leaders do not look forward to giving these revealing presentations about their destructive leadership beliefs and behaviors. Nothing good will come of poorly prepared leaders who will embarrass themselves in front of their peers.

**Select leaders from different departments.** The tribal instinct is strong. Every organizational tribe erects barriers to members of other tribes. The only evidence-based way for leaders to overcome their tribal instinct is to collaborate with other tribe members by finding and building on their common ground and working together toward a common goal.

## Adopt a Family-Friendly Schedule

The organizers of national leadership conferences schedule their events based on their predictions of attracting the highest number of attendees. Their priority is dollars, not the integration of their customers' work and family lives. Once your company decides to send you to such a conference, you immediately feel obligated to attend. The vendor's schedule often requires you to sacrifice time with your family to accommodate their scheduled dates and travel requirements.

While the pandemic of 2020 may have forced conference organizers to offer virtual alternatives, observing strangers on a screen is not as conducive to building strong relationships as extended face-to-face contact. While the intensity of our social needs varies, we are all social primates, and all organizational leaders recognize the need for bonding. Organizing a private leadership retreat may be a better way to accomplish your leadership learning goals.

**Protect the weekends for families.** Travel to the conference on Mondays. Return home on Fridays. By limiting the leadership conference to the workweek, you will demonstrate your respect for your leaders' obligations outside work.

**Limit travel time.** Drive instead of flying. Choose venues that are no more than six hours away from home. Limit the group to eight participants, and send four leaders in each vehicle. The road trip will become a useful relationship-building tool in itself.

**Minimize frequent travel delays.** Although unexpected travel delays will always occur, they will contaminate your retreat experience much less often if you are not dependent on the airlines and transportation to and from the airports.

## Engage Local Experts

Here is another curious thing about the human brain. We naturally assume we can learn more from a national expert than from the experts down the hall. Conference vendors exploit this false assumption that a celebrity speaker knows more about our problems and how to solve them than we do.

When you read the previous paragraph's last sentence, you realized what a silly notion that is. We are the only people who can understand and solve our problems. Sure, experts may offer a few helpful perspectives and suggestions, but we would usually be better off by reading their book or watching their Ted Talk instead.

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**The evidence is clear. Active learning is much more useful than passive learning.**

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**Re-frame your learning strategies.** Replace most of your passive leadership learning with active leadership learning. Introductory presentations still have a role, but leader engagement in personal problem-oriented, team-based education will be more productive.

**Give your leaders the teaching and learning tools they need.** When leaders learn the basic structure of a leadership case study (LCS), they will embrace this simple but powerful learning tool enthusiastically. The LCS then provides a foundation for more sophisticated active learning strategies. The evidence is clear. Active learning is much more useful than passive learning.

**Challenge leaders' destructive beliefs.** Our brains create feelings of inadequacy because we have bought the bogus assumptions the conference merchants are selling. We are fully capable of identifying and solving our leadership problems ourselves. Indeed, we are the only ones who can.

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**We leaders (and most human beings) assume we know what others think and feel; it is safer to believe we have no idea about what perceptions and feelings our colleagues' brains are generating and to ask them instead.**

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## Prepare Participants Beforehand

Senior leaders have forgotten how intimidating a new active learning challenge can be. We often assume that invitees know more about the upcoming retreat than they do, and we forget to view the looming retreat through the participant's eyes. We leaders (and most human beings) assume we know what others think and feel; it is safer to believe we have no idea about what perceptions and feelings our colleagues' brains are generating and to ask them instead.

Careful retreat preparation allows the participants to meet each other and build relationships with colleagues in other departments they may barely know. Few people look forward to public speaking, and people don't want to embarrass themselves in front of their peers. A retreat overview that describes what will happen reduces anxiety, instills confidence, and generates excitement.

Schedule a retreat orientation. Make sure this meeting occurs at least a few weeks before the retreat. Accept the participants' apprehensions, and thank them for embracing this energizing discomfort. Reassure them they will do just fine. Share testimonials from prior attendees, and invite the current class to contact a previous attendee they know to get additional information and coaching.

Take time for meaningful introductions. Ask everyone to answer the following email questions and reply to all attendees: Where was I born and raised, and what was most significant about my childhood? What is my educational background, and how

did it impact me? What is my work history? What about my family, and what are my passions at home and work? What is the mission of my life?

Give a brief presentation as an example. Provide a presentation template and encourage everyone to reach out to more experienced leaders for coaching about how to make their presentations most effective. Explain the difference between active and passive learning. Describe the discussion and documentation process that will follow each presentation.

## Build Interdepartmental Relationships

Most leaders give lip service to the truism that maintaining silos in our organizations is dreadful, but they often fail to follow through and dismantle them. Just like everyone else, leaders are tribal primates, too. When things don't go their way, it's much easier to blame and shame another department than accept responsibility and ask for help.

Healthcare is a team sport. We all need each other to succeed. When people build relationships with their colleagues in other departments, they gain a new perspective on their shared problems. And these different perspectives produce many more possible solutions. Then too, this kind of teamwork encourages workforce engagement and enhanced job satisfaction. And a leadership retreat is a perfect place to start.

**Help leaders find and focus on the common ground.** Human brains are always scanning the environment for our differences. News and social media producers understand this foible and seek to exploit it. Focusing on what unites us instead of divides us demands intention, engagement, and persistence.

**Engage leaders in solving a common problem.** After participating in SOMC Leadership Rounds and Leadership Retreats, a common theme emerges: We had no idea that we were all grappling with the same issues. We thought we were the only ones. This realization is highly engaging for leaders who are intent on improving their leadership skills.

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**Encourage leaders to create collective memories.**

When you ride in a car for hours, share many meals, and, most importantly, solve a problem together, you build a shared history. And random stuff always happens on these trips, which creates rich associations in the participants' brains. Our leaders often tell us that they would feel free to come to anyone at the retreat with any issue for the rest of their careers. How powerful is that?

## Select an Inspiring Venue

While our SOMC Leadership Retreats only cost about one-third of what we used to pay to take leaders to national conferences, they are not inexpensive. There are always naysayers who insist these retreats are a waste of money. The critics maintain we could accomplish the same thing in a conference room at home.

Just try to replicate the retreat experience at work. Cell phones will continuously be ringing, announcing crises that only the phone's owners can solve. Maintaining the group's focus during the presentations and the discussions that follow will be impossible. Everyone at the table will be preoccupied with problems down the hall or the street.

Here's what our leaders have consistently told us. You must go far enough away to leave the usual distractions behind, and you must be in a different environment that awakens the senses, creates awe, and promotes reflection and innovation.

**Select a resort at least four hours from home.** Here are our current favorite venues: [The Omni Grove Park Inn](#), [The Omni Homestead Resort](#), [French Lick Resort](#), and [JW Marriott Indianapolis](#).

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**Aping someone else's excellent service behavior won't get it. Humans are highly skilled in distinguishing real sincerity from fake sincerity.**

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**View these retreats as a reward and recognition for your leaders.** These people are making themselves available 24/7. They are doing the heavy leadership lifting, persuading themselves and others to do the right thing, day after day, despite how they feel. Our leaders are absorbing all kinds of abuse and

resolving endless conflicts behind the scenes, never getting the credit for the sacrifices they've made. These people deserve a few days of splendor and pampering now and then! Let the critics grouse on.

**Invite your leaders to decide whether a venue should remain on the list.** The leaders who attend are in the best position to judge whether their colleagues would also find a particular setting appropriate for a retreat.

## Expect Excellent Customer Service

Every healthcare leader acknowledges that the patient experience is critical, and every organization has launched an initiative to improve their patient satisfaction rankings. Many of us are falling far short of our goals, but we have a list of excuses ready to explain our leadership failures. "We are a hospital, not a fine hotel," and "we are not in the entertainment business" always make the top ten.

But do leaders in other service industries have something to teach us in healthcare? Of course, they do. Outstanding customer service is the same wherever it occurs, and being on the receiving end of world-class service is inspiring, illuminating, and motivating. This chance to learn from the best in the world is an opportunity you don't want to miss.

**Choose venues that provide exceptional service.** If you choose a four- or five-star resort for your retreat, you can be reasonably confident their service will WOW you and your team.

**Observe and discuss moments of outstanding service.** Their examples will allow you to take notes and discuss how you might replicate something like this back home. It's important to remember that excellent service is context-dependent. You can learn from service stars, but you cannot do the same thing they did in your organization. You will need to customize that behavior to your company's culture. Aping someone else's excellent service behavior won't get it. Humans are highly skilled in distinguishing real sincerity from fake sincerity.

**Implement the excellent service behaviors you observed when you return home.** The best way to implement improved service behaviors in your company is to demonstrate those behaviors to your team. You cannot expect your team members to serve their patients any better than you serve them.



## Schedule Time for Relaxation and Reflection

Most leaders focus on completing tasks and persuading others to do the same. They are intent on getting stuff done. Such leaders tend to equate time spent reflecting as time spent slacking. Moreover, when these leaders have an audience, they much prefer speaking to listening. Like all aspiring entertainers, they see the retreat as another opportunity to be the sage on the stage.

Remind yourself and others that reflection is essential for permanent learning and innovation. For this reason, you should make this a priority at every retreat. Presenting and discussing real leadership case studies creates a considerable cognitive load for retreat participants, and everyone needs some time and encouragement to decompress.

**Make time for relaxation and reflection on the agenda.** Take a different approach at your next company retreat. Summon the emotional intelligence to talk less and replace that time with opportunities for quiet reflection and relaxation.

**Be a role model.** Executives set the tone for the retreat. Lead a brief discussion at dinner by describing how you relaxed and what you reflected on during your free afternoon.

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**Remind yourself and your colleagues that we cannot consistently produce exceptional results without adequate sleep and a daily commitment to wellness. Then practice what you preach.**

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**Discuss ways to implement this practice back home.** During one of the discussions, ask your colleagues about their preferred methods for reflection about innovative ways to approach their problems. Tell stories about your reflection practices. Remind yourself and your colleagues that we cannot consistently produce exceptional results without adequate sleep and a daily commitment to wellness. Then practice what you preach.

## Promote Active Learning

Most leaders spent countless hours listening to lectures while completing their education. A few of those presentations were energizing; most were debilitating. Unfortunately, this pattern continues during our working lives because it has the power of the status quo and entertainment appeal behind it.

Recognizing that overwhelming evidence proves such passive learning is mostly worthless, invest the time and effort to encourage real learning at your leadership retreat. But do more than launch some equally useless icebreakers and silly tabletop exercises.

**Require all the attendees to present.** Suppose attendees must describe a real leadership challenge they have faced and identify the beliefs, feelings, and responses they experienced during it. Then, you can be sure some real learning will occur.

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**Structure each presentation as an active learning exercise.** Instead of asking each attendee to give a presentation and then invite feedback, encourage presenters to pause and solicit suggestions from their peers about what they might have done next before revealing how the leader felt and behaved.

**Require post-presentation documentation.** Require each listener to document their reflections and suggestions on some teamwork media, such as Yammer. This thoughtful documentation will allow attendees to learn from each other and preserve this valuable intellectual capital for later use.

## Plan Working Meals

Most leaders believe that socializing during a business meal is the goal. It's what everyone feels like doing. Most business meals seek to strengthen relationships between the diners by engaging in entertaining conversations, preferably oiled by alcohol. Business meals are supposed to be fun; moreover, everybody else does this in these situations.

While there is some relationship-building value in engaging in entertaining conversation during a business meal, this practice is much less effective in building strong relationships than engaging in active learning. Nothing enhances teamwork more than working on a challenging project together and creating a sense of group accomplishment as a result. Discussing leadership case studies and group brainstorming are two practical tools for achieving that goal.

**Clarify your expectations.** Your colleagues cannot read your mind. Unless you make it clear what you expect to accomplish at dinner, they will show up unprepared and proceed to do what they feel like doing, which is not likely to include meaningful work.

**Explain how.** Ask each retreat participant to prepare three Leadership Case Studies (LCS) for the week. Schedule retreat attendees to take turns presenting their cases and then inviting their dinner companions to share their perspectives and recommendations after three quiet minutes of jotting down their notes, nowadays on their smartphones. The rich conversations that will follow will allow you to cover only one or two LCS at each working meal.

**Document the rich leadership insights your group develops.** Ask presenters to post their LCS on your team's private Yammer Group page immediately after dinner so everyone else can post their reflections. Your team will have then completed a meaningful active leadership learning project and created and preserved valuable intellectual capital for your organization.

## Discuss Real Leadership Case Studies (LCS)

Most leaders mistakenly believe they can and should always lead perfectly in every situation. They reflect on what happened and conclude they either did the right thing or the wrong thing. Naturally, these leaders are hesitant to discuss what they regard as their leadership mistakes and shortcomings. They prefer to forget what happened and move on.

This all-or-nothing approach to leadership performance eliminates the opportunity to learn from experience and from others. The notion that what a leader did was right or wrong is too simplistic. Leadership perfection is in short supply, but improving one's skills is undoubtedly achievable. More seasoned leaders rate their reactions from 0-10 and seek feedback from their colleagues about what they might have done better. They record what they learn from these discussions in their leadership journals and deploy more effective techniques when they confront a similar leadership challenge in the future.

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**Remember, strong emotions always hijack your rational mind and limit your ability to explore every leadership option.**

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**Seize every opportunity to write a simple Leadership Case Study (LCS).** Anytime your brain generates strong negative feelings at work, these feelings are an invitation to write an LCS, reflect, and learn. And you will learn the most from discussing your case with fellow leaders.

**Answer four simple questions.** In its basic form, a leadership case study consists of four simple questions and answers. What happened? How did I feel? What did I do? What might I have done instead?

**Ask your colleagues to help you identify different options.** In every leadership challenge, you will have a variety of options, some better, some worse. Because of your strong feelings, you will not see as many options as your more detached colleagues. Remember, strong emotions always hijack your rational mind and limit your ability to explore every leadership option.



## Record the Retreat Presentations on Video

Some leaders fear public speaking more than death. Knowing that they will have to review their shortcomings on video only adds to the dread. Apprehensive presenters want to get this unpleasantness over with and move on. Having their discomfort recorded and preserved is the last thing they want.

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**It turns out that even the strongest leaders, fearful of hurting others' feelings, usually cannot bring themselves to be honest with their colleagues.**

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But enduring and benefiting from the energizing discomfort of watching yourself on video is the most effective way to improve your presentation skills. Remind yourself you must become a competent presenter if you hope to succeed as a leader. The temporary distress of having your presentations recorded will be easier to endure than the leadership failures you will experience from your failure to improve.

**Make video recordings a leadership expectation.** Don't give leaders a choice. These opportunities to see our options for improvement are too significant to miss.

**Publish a list of presentation do's and don'ts.** Such guidelines are readily available on the Web, and a video record of your performance is a much better instructor than direct feedback from listeners. It turns out that even the strongest leaders, fearful of hurting others' feelings, usually cannot bring themselves to be honest with their colleagues.

**Encourage deliberate practice.** We improve by identifying presentation behaviors we wish to change and then deliberately focusing on those behaviors until we have permanently altered them. This evidence-based approach to improvement means we must provide presenters with ongoing video feedback if we want them to become more effective presenters.

## Create a POLLO Presentation Template

Writing and giving a Problem-Oriented, Leadership-Learning, Opportunity (POLLO) presentation is challenging. This process requires leaders to be honest with themselves and others about what happened, how they felt, and what they did in an upsetting leadership situation. The hardest part is thinking deeply about the mistaken leadership beliefs their brains used to trigger their feelings and behaviors. Our brains don't welcome questions about their assumptions.

Until you change how you behave—and sustain that change—you have learned nothing. Until you change the mistaken beliefs behind your behaviors, you will not maintain your behavioral change. You will not change your feelings until you adjust your beliefs and behaviors. We all want to change when we feel like it. It's the other way around; after we change, we eventually start to feel like it.

**Present an example.** When leaders realize they must create and present a POLLO presentation, they will stay focused while you give yours. Necessity is the mother of attention, too.

**Create a presentation template.** A typical POLLO presentation asks and answers the following crucial leadership questions:

- » “What is the problem?”
- » “What is the solution?”
- » “What happened?”
- » “What are the basic expectations for all SOMC leaders?”
- » “What feelings will I change?”
- » “What behaviors will I change?”
- » “What beliefs will I change?”
- » “What checklist will help me reprogram my brain?”
- » “What are some of my key personality traits?”

**Coach new presenters through the creation process.** Most leaders will have difficulty in identifying and accepting their underlying leadership beliefs. This obstacle is not surprising since our brains use the assumptions they have absorbed or created to instruct us how to feel and behave. And our brains engage in this complicated decision-making process instantaneously, often outside our conscious awareness. You can best get at your underlying feelings by asking yourself, “What must I have believed to feel and act that way?” Most of the time, you won't like the answer. But you can use that discomfort as motivation for sustained change.

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## Build and Strengthen Leadership Competencies

Most new leaders fly by the seat of their pants. When conflict occurs, they do what they feel like doing, even when it doesn't help or makes matters worse. These novices fail to appropriately respond because they have not developed the leadership competencies required to manage the situation expertly. Every leader has two problems when facing a leadership challenge: knowing what to do and doing it. No leader is competent until he or she knows what to do—and does it. Achieving this basic competence is harder than it sounds.

Your most direct path to becoming a competent leader is to develop a practical checklist of the essential steps you should take in a given situation. Of course, every circumstance is unique, but developing standardized approaches to recurring leadership problems will allow you to begin building and improving your leadership competencies. You will rarely achieve a ten on the leadership competency scale, but you can raise your rating from a two to an eight pretty quickly with deliberate practice. And leaders who perform in the top quartile are much more proficient than those in the bottom 25-percent.

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***Make a list of the top 20 leadership competencies leaders need to acquire.*** Most leaders would agree that they must be competent to manage complaints, resolve conflict, persuade others, and make a compelling case for change. This list is only a start, but it is a good start.

***Create a checklist of the crucial steps you need to take in those situations.*** Here is a useful protocol for managing complaints:

- » I will recognize my emotional arousal and calm myself by taking notes.
- » I will not promise confidentiality.
- » I will accept the complainer's feelings.
- » I will ask clarifying questions.
- » I will promptly send a documentation email to the complainer about the complaint and clarifying my next steps.
- » I will conduct a thorough investigation.
- » I will announce my decision.
- » I will clarify my expectations and hold everyone accountable.

***Continuously improve your checklists.*** With experience, coaching from successful colleagues, and deliberate practice, you will build sophisticated leadership competencies for managing complaints and other leadership challenges.

## Change Leadership Beliefs

Leaders' beliefs drive their feelings, and their emotions drive their behaviors. Like all human primates, when a leader's brain has adopted an assumption, that brain is reluctant to give it up. It gets worse. The more irrational the conviction, the more tightly the brain holds onto it. And our brains hide behind the emotions they create; it is not easy for leaders to discover their flawed assumptions or replace them with evidence-based beliefs.

But replacing flawed leadership beliefs with accurate assumptions is what the lifelong leadership learner must do. The best leaders understand their brains are indiscriminate belief sponges that have embraced some flawed ideas about leadership. Leaders who think critically know they can choose what to believe and change what they believe—despite how they feel. And they know they must. And they will.

***Identify the beliefs you want to change.*** The best way to accomplish this is to look behind your feelings to see what assumptions might have produced them. If you are drawing a blank, ask a fellow leader with experience in identifying stealthy beliefs to help you. Others sometimes see us more clearly than we see ourselves.

**Create a checklist for this critical leadership competency.** Here is one such list:

- » I will identify the inaccurate, destructive beliefs I intend to change.
- » I will acknowledge that my destructive leadership behaviors are the result of my flawed beliefs.
- » I will assess my readiness for change.
- » I will work backward from the destructive behavior I want to change to the flawed leadership belief that my brain uses to create the destructive feelings that trigger that behavior.
- » I will identify the accurate, constructive belief I intend to embrace in its place.
- » I will consider the evidence for and against both beliefs.
- » I will consult with my colleagues, who will help me recognize the destructive belief I need to change.
- » I will document my conclusions and my changed beliefs in my leadership journal.

## Change Leadership Behaviors

Our brains instruct us how to behave by creating feelings that compel us to react in a particular way. We can resist these urges, but doing so requires a large amount of willpower, the daily supply of which is limited. We all find ourselves behaving in ways we'd rather not and regretting those actions afterward. Our brains are prediction engines. When we find ourselves in similar situations, we tend to feel and behave in similar ways. And these ingrained patterns of perception and behavior can be tough to change.

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**Our brains don't welcome questions about their assumptions. And our brains hide behind the emotions they create; it is not easy for leaders to discover their flawed assumptions or replace them with evidence-based beliefs.**

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You must frequently do what you don't feel like doing if you hope to succeed as a leader. You cannot always trust your brain. It will often mislead you.

**Identify the leadership behaviors you want to change.**

This step is easy. You need only to reflect on how you behaved in a challenging leadership situation and ask yourself what you wish you had done instead.

**Create a checklist for developing and strengthening this vital leadership competency.**

Here is an example of such a list:

- » I will identify the behavior I want to change.
- » I will identify the destructive beliefs and feelings that trigger my dysfunctional leadership behavior.
- » I will assess my readiness for change.
- » I will list my reasons for changing.
- » I will make a public commitment to change.
- » I will measure my progress.
- » I will reserve the willpower I need to succeed.
- » I will identify the barriers to change I must overcome.
- » Instead of merely stopping my flawed behavior, I will replace my ineffective behavior with better behavior.
- » I will ask my colleagues to hold me accountable for my commitment to change.

## Preserve Intellectual Capital

When leaders change their beliefs and behaviors or find a better way, they become more successful leaders. They are less distressed, and they find their work more gratifying. But they often fail to document what they have learned. When they retire, the intellectual capital they have created walks out the door with them and is lost forever. Preserving leadership learning for the next generation demands an additional investment of time and energy. And it is easy to let this critical task drift to the bottom of the pile.

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**The conceit of ignorance mistakenly convinces uninformed leaders they have nothing to learn from the past. And studying history saps time and energy from pressing daily tasks and soothing entertainment.**

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If the next generation of leaders is to sustain and strengthen the SOMC Leadership Culture we enjoy today, we must leave them a solid foundation on which to build. We have an obligation to those leaders who follow us to leave a record of the price we paid, the lessons we learned along the way, and the attitudes and behaviors we changed. If we fail to do that, they will fall into traps we might have warned them to avoid.

**Continue to participate in leadership learning.** By continuing to present and comment on leadership case studies, POLLO presentations, and SOMC Book Club online discussions, you and your colleagues will create invaluable intellectual capital for your successors.

**Keep a personal leadership journal.** Unless you record what you have learned, you will forget much of it. Your leadership journal will reinforce what you have learned and enable you to coach new leaders more effectively.

**Contribute to the SOMC leadership documentation.** Post your work on the SOMC Yammer Group pages, which have become a rich reservoir of leadership wisdom. Record your POLLO presentations so others can benefit from what you have learned. Join the SOMC Leadership Blog online discussion. Invest time and energy in the future by giving light to your successors who might otherwise stumble in the dark.

## Review the History of the SOMC Leadership Culture

For some, history is dull, uninteresting, and irrelevant. The phrase “the dustbin of history” reflects the typical disregard for the value of what happened before. The conceit of ignorance mistakenly convinces uninformed leaders they have nothing to learn from the past. And studying history saps time and energy from pressing daily tasks and soothing entertainment.

Leaders paid a high price for creating our current organizational reality. Suppose you remain ignorant of their investment in your future. In that case, you will fail to realize that you must continue to invest substantial energy in a leadership system that tends to disorder and will become dysfunctional without your continued effort.

**Read about the SOMC Leadership Culture.** Studying [Changing the Culture](#) and reading other [SOMC White Papers](#) is the place to start.

**Select and collaborate with a mentor.** There is no substitute for the rich learning that results from a long-term relationship with a wise mentor. All successful leaders view the opportunity to advise sincere, emerging leaders as a joyful privilege.

**Interview senior leaders before they retire.** Be sure to document your interviews so your fellow leaders can benefit from these leaders’ perspectives. Here are some questions you might want to ask:

- » How has the SOMC Leadership Culture changed during your tenure?
- » How did you and your colleagues make those changes?
- » What price did you and your colleagues pay to change the culture?
- » What about the SOMC Leadership Culture needs to change now?
- » What are the most significant barriers to making those changes?

## Encourage Wellness

Adopting and sticking to a wellness lifestyle is hard for most of us. We are all at war with our brains, which compel us to pursue solace, sugar, salt, and satiety. We are powerfully influenced by a culture that accepts and encourages a sedentary lifestyle focused on pleasure and consumption instead of energizing discomfort and contribution. Striving is hard. Slacking is easy.

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**The pursuit of wellness is a marathon, not a sprint. And the finish line is a death gratifyingly delayed.**

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SOMC leaders are role models, whether we realize this or not. Our colleagues are watching us closely and using our conduct to decide what lifestyle behaviors are encouraged, discouraged, and tolerated in the SOMC culture. Moreover, adopting a healthy lifestyle is the best way to stay healthy. Duh.

**Make wellness activities part of the retreat schedule.** Encourage walking, hiking, and swimming during the protected hours in the afternoon. Ask every retreat participant to bring workout gear for the fitness center at the resort.

**Lead by example.** If you are failing as a wellness role model, admit your behavioral shortcomings openly. Announce your intention to do better, and ask for your colleagues' patience and support.

**Reinforce healthy behavior.** When a fellow retreat participant engages in some wellness behavior, thank them for being a good role model and encouraging you on your wellness journey. The pursuit of wellness is a marathon, not a sprint. And the finish line is a death gratifyingly delayed.

## Capture Participant Testimonials and Opportunities to Improve

These retreats are highly stimulating and mentally exhausting. When you complete them, it's easy to forget these final critical steps. Once you start home, your attention will naturally shift from finished to unfinished business.

Remind each other you have not finished until you have recorded your testimonials and opportunities for improvement. If you and your colleagues do not complete the post-retreat work before you return home, the pile waiting for you will hijack your attention, dilute your memories, and diminish your resolve. Immediately recording your perceptions in your journals and on your Yammer page increases your retention, promotes reflection, and permits recall for later use.

**Make these agenda items.** This schedule item will decrease the chance you will forget these critical last steps in the retreat process.

**Define a timeline.** Ask attendees to post their testimonials and recommendations for improvement on the Yammer Group page before beginning their return trip home.

**Recognize the retreat participants.** Provide a certificate acknowledging participants' progress on their leadership journeys. Consider giving attendees a retreat t-shirt as a reminder and an advertisement.

## What have our leaders said about these leadership retreats?

This is my third Leadership Retreat. They have all exceeded my expectations and, in my view, are an essential organizational investment. Most other courses/seminars/books dealing with "leadership" are content generating a vague emotional desire to be a better leader. By contrast, SOMC Leadership Retreats actually give attendees the practical tools and enhanced relationships needed to make it happen.

**Ben Gill**  
President & CEO

This leadership retreat has been an eye-opening experience and has given me so many valuable tools I can use in my career and even my life. I will forever be grateful for this opportunity and found the whole experience to be priceless. I've built relationships with other leaders in the organization that I would have never normally gotten to know. I am excited to utilize the skills I've learned and share some of these tools with my team.

**Megan Tepe**  
Manager, Ultrasound

The retreat has been transformative in my approach to personal and leadership challenges. Deliberate practice is key to skill acquisition -- the repeated opportunities to explore scenarios through the POLLO presentations and less formal LCS discussions are invaluable. Finally, the opportunity to hear about the transformation of SOMC culture (but after I had a firm grasp of the CBL model) helped to reinforce lessons learned.

**Jeremiah Martin, MD**  
Senior Medical Director  
Thoracic Surgery





Dr. Stewart is the Vice President for Medical Affairs and the Chief Medical Officer of Southern Ohio Medical Center, and the Chairman and CEO of the SOMC Medical Care Foundation, Inc., a multi-specialty physician practice group in Portsmouth, Ohio. Dr. Stewart is a Clinical Professor of Psychiatry at

the Ohio University College of Osteopathic Medicine, and he also still practices adult psychiatry part-time.

Dr. Stewart was born and raised in Rome, Georgia. He graduated from Berry College in Mount Berry, Georgia, and received his MD from the Medical College of Georgia. He completed his psychiatric residency at the Medical College of Georgia. He then served as Chief of the Mental Health Clinic at the US Air Force Hospital near Rapid City, South Dakota. He opened his private practice in Portsmouth in 1981. He subsequently earned an MBA from Ohio University.

Dr. Stewart is a Diplomate of the American Board of Psychiatry and Neurology and a Distinguished Life Fellow of the American Psychiatric Association. He is a past president of the Ohio Psychiatric Physicians Association. Dr. Stewart is a former Chairman of The Partnership for Excellence. He also served as a member of the Board of Examiners for the Malcolm Baldrige National Quality Award. Dr. Stewart is the senior author of ***A Portable Mentor for Organizational Leaders***, a book published by SOMC Press. He and his wife, Fay, have two sons and two grandsons.