



# The Simple Leader

Personal and Professional Leadership  
Habits at the Nexus of Lean and Zen

Kevin Meyer

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Kevin L. Meyer

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# Introduction

A year ago I was president of a medium-sized medical device company as well as a consulting company, a partner in two technology startups, a board member with two more, and a blogger and obviously an author. I can't get enough of new projects and wild ideas.

Still, I had a total of six emails in my inbox and perhaps twenty saved. My wife and I still out every night and we are fortunate to be able to take several vacations a year.

Does that sound liberating, scary, or impossible? That is just the opportunity of simplifying leadership.

The first decade or two of my career followed the rather traditional path of a newly-minted engineer: learning how to operate in a couple of large companies, discovering what interested me - in my case it was medical device manufacturing - and eventually moving into management. I became aware of lean manufacturing, also known as the Toyota Production System, when I was thrust into a difficult turnaround situation with my first plant-level leadership position.

Eventually I decided to take a stab at the telecom equipment space. Little did I know the entire industry would completely melt down a year later. My experiment in a different industry soon resulted in shutting down an entire facility and laying off a couple hundred brilliant friends - on September 10th, 2001. What a week. I included myself in that layoff, started and eventually sold a contract manufacturing company, began doing some lean manufacturing consulting, and eventually found my way back into a "real" job as president of a medical device company. Consulting was interesting, but I simply love the real world of transforming real organizations making real things.

Life was pretty good. I worked for a great company, had many fun side projects, got to live and play on the beautiful central coast of California with my wife of nearly a decade. I worked hard but I also played hard, and was able to convince accounting that it really was cheaper to fly home from Chicago via the Bahamas if I stayed over the weekend. I had already begun the shift away from describing wealth in material terms, realizing the value of peace, love, and physical and mental exploration. Work was fairly well balanced with life.

Then life took a nasty turn. A family medical situation exploded into unpredictable chaos and unbelievable stress, which severely impacted both the personal and professional sides of my life. Even my closest friends and family have no idea how close I was to hanging it all up and disappearing to live in a tent on a beach in Samoa. Seriously.

I wasn't willing to give up the professional side as it provided a needed break from the reality of the personal side. But something had to change. I began to realize that several concepts from lean manufacturing could be applied to simplify my personal life. I also began to understand how several Zen concepts I had begun to explore in my personal life (hey, this is California!) could be applied to simplify my professional life.

One day it finally dawned on me, while sitting alone on my favorite beach on the Big Island of Hawaii, that balance can be created through a focus on simplification and an understanding of what was truly important. I didn't know it at that time but the act of sitting alone on a beach was important in itself - a form of *seijaku* - quietude - and *datsuzoku* - a break from the routine.

After two or three years the medical situation became manageable, but I continued to explore and further define how lean and Zen concepts could be applied to personal and organizational leadership - and also how there was a fascinating relationship between those concepts themselves. A turning point was reading Matthew

May's The Shibumi Strategy which coalesced and reinforced several concepts and habits I had developed, especially on the personal leadership zen side of things. Finally, over the past year or two I've noticed many articles on leadership, particularly when related to servant, lean, or zen styles, align with my thinking.

Leadership does not have to be complex. Mastering personal leadership is necessary to master - and demonstrate - professional leadership. A core group of concepts aligned around simplicity - kanso - can be applied to both forms.

I know I'm treading into some risky waters. Lean concepts, while often misunderstood and misused, are fairly mainstream. Zen concepts are still viewed with skepticism if not outright derision by traditional western folks, and there's a new flavor of leadership created virtually every minute. In fact, my Evolving Excellence co-author Bill Waddell once remarked,

To be a leader, a manager should master Accountability Leadership, Collaborative Leadership and Contagious Leadership. He should get his or her arms around the Tao of Leadership and learn how to Lead From the Front and know Leadership That Works. There is Spiritual, Ethical, Inspirational and Moral Leadership - all separate approaches. There is a 5th Wave of Leadership to master (no first through fourth, however), along with Thought Leadership, Facilitative Leadership, Systematic Leadership and, most important, I would imagine, Grown Up Leadership.

Bill continues by listing about fifty more.

This leadership business is clearly tough stuff. It takes a solid commitment to life long learning and a hefty Amazon account to become a leader.

No kidding. But it doesn't have to be that complex.

I don't create scholarly theoretical models. I'm a practitioner, and prefer to focus on concepts I've developed, tried, and refined in the real world. This book is about sharing what works for me. Perhaps some of the ideas will help you on your leadership journey.

Kevin Meyer

Morro Bay, California

# Discovering Lean

Nearly two decades ago I was doing pretty well. I had progressed up through the engineering ranks at a Fortune 50 medical device company and was now running an operations business unit responsible for a high profile product. Life in Silicon Valley was pretty good. Then I got the call from corporate: “how would you like to run a large operation in Salt Lake City?” To a young career-oriented guy it sounded great. My own operation, new city, a chance to move up. Without asking a single question I said yes.

Lesson learned. Questions can be good things. More questions even better. In this case I found myself running a 24/7/365 molding operation cranking at full tilt... and falling further and further behind on orders with no apparent way to catch up. Toss in some questionable “activities” on the night shifts, huge visibility - and heat - because this operation supplied components to critical downstream plants, and I soon realized that sleep would be a luxury for a while.

What the hell could I do? Luckily I had one huge asset in my favor: a bunch of talented folks equally frustrated with the situation but eager to find a solution. I started to poke around on the internet, which was still in its infancy, and discovered something called “lean manufacturing” and an organization called The Association for Manufacturing Excellence. I began collecting resources, which would later turn into a side business in itself, and reviewing the concepts with my staff.

We learned how to describe value from the perspective of the customer, focus on flow, reduce inventory, and streamline processes. We learned about quick changeover. We experimented, failed often, but succeeded more and more. After a year we had caught up and were even finding ways to get rid of antiquated equipment - reducing capacity - while increasing production. This lean stuff

really worked, and in the real world no less.

My passion for lean grew rapidly, however the company wasn't at a point in its evolution to fully embrace the concept. In hindsight this is a lesson on the importance of executive commitment to the lean transformation process itself: great improvements can be made at lower levels, but a true organizational transformation requires a cultural change driven from the top. After a frustrating couple of additional years I decided to leave this company. Interestingly the company is now known for its lean prowess - perhaps the early efforts by people like me did have some impact after all.

I moved back to California in 2000 to run the operations side for a recent acquisition of a large telecom equipment manufacturer. When I came on board this operation had a backlog of nearly a year and the long lead times was costing significant business. Once again, the heat was on. By leveraging lean methods our team increased output from \$500,000 to \$5,000,000 a month in less than six months - with the same floorspace, equipment, and people.

Unfortunately around the middle of 2001 we began to experience a few order cancellations, and little did we know that this was the edge of the cliff that nearly all technology companies went over later that year. The drop off came so fast that we were still hiring when we began planning our first layoff. On September 10th, 2001 I laid off the entire operations group, including myself - although the events of the next day would put that pain into a different perspective. The remaining operations were consolidated into the corporate facility several hundred miles away, a decidedly non-lean operation, once again demonstrating the fragility of lean.

My confidence in the lean had grown to the point that instead of looking for a new job I got together with a couple buddies and started a contract manufacturing company. We thought we could leverage the power and magic of lean to tackle the painful jobs that no one else wanted. And we thought that since that was such a compelling business model that we would have no problem finding

business. I was always somewhat envious of the jet-setting lifestyle of friends in sales and marketing and never understood why they were paid so well. Well this is where the three of us, all operations grunts, learned what sales is all about - the hard way. After three years of basically paying our employees but never ourselves we decided it was time to admit we had just learned a lesson. We shut the company down and went our separate ways.

Over the years that original list of lean resources had morphed into one of the largest and most comprehensive websites on lean. I had also been asked to join the board of directors of The Association for Manufacturing Excellence. After shuttering the contract manufacturing operation I leveraged the wealth of contacts from those activities to join the consulting world.

One of those contacts led me to some contract work at a medical device company a short drive from home on the California central coast. One thing led to another and I soon found myself President of the company, with three plants in California and Michigan. The long-term vision, commitment, and patience of the two owners the last seven years have provided the opportunity for some radical lean improvements. We reorganized into value streams, developed incredible teams, and even eliminated budgets. Thanks in large part to lean improvements we were successful enough to build a large new facility, in expensive California no less, in the middle of a recession. We also turned traditional outsourcing thinking on its head by shipping product from California to China and India.

We learned a lot of valuable lessons along the way. And I learned how to leverage many of those same lean concepts to become personally more productive. Later in this book I'll be sharing many of those lessons from both personal and professional perspectives.

## A Short History of Lean

To some people lean manufacturing was invented in Japan and is synonymous with the Toyota Production System - the manufacturing philosophy that enabled Toyota to effectively conquer the global automobile market. Many believe the company's relentless focus on the elimination of waste almost by definition drives a reduction in workforce, and this is why the vast majority of Toyota is not unionized. A handful are convinced that lean led to Toyota's quality stumbles in 2009 into 2010.

Nothing could be further from the truth. Fundamentally lean is about creating value - not just eliminating waste - and empowering people, and it was developed long before Toyota. Long before the 20th century in fact.

Some trace the roots of lean all the way back to the Venice Arsenal in the mid-1500's when King Henry III of France watched the Arsenal roll complete galley ships off the "production line" every hour. A remarkable achievement enabled by several weeks of assembly time was sequenced into a continuous, standardized flow.

Standardization took root and by 1760 the French understood the significance of standardized designs and the interchangeability of parts to facilitate repairs on the battlefield. Eli Whitney refined the concept when he won a contract to build 10,000 muskets at an unheard of low price. Militaries around the world fine-tuned continuous flow and standardized processes through the 1800's with the concept making a slow transition into commercial manufacturing.

In 1910 Henry Ford moved his nascent automobile manufacturing operations into Highland Park, which is often called the "birthplace of lean manufacturing." Continuous flow and standardized processes, coupled with innovative machining practices, enabled highly consistent assembly. Ford often cited the frugality of Benjamin Franklin as an influence on his own business practices,

especially Franklin's advice that avoiding unnecessary costs can be more profitable than increasing sales. In 1911 Sakichi Toyoda visited the United States and witnessed Ford's Model T production line and returned to Japan to try what he saw on his hand loom weaving machines.

Ford continued to improve with core chassis assembly time rapidly dropping from twelve hours to less than three. That reduced the cost of a vehicle to the point where it became affordable to the masses, which created the demand that helped build Ford's River Rouge plant - which became the world's largest assembly operation with over 100,000 employees. Parallel to the improvements in assembly methods were developments on the quality and human factors aspects of manufacturing.

In 1906 Italian Vilfredo Pareto noticed that 80% of the wealth was in the hands of 20% of the population - and then found that ratio to be surprisingly common throughout the world. J.M. Juran took the Pareto Principle and turned it into a quality control tool that focused on finding and eliminating the most important defects. A few years later Walter Shewhart invented the control chart which allowed for the monitoring of process variables. Shewhart went on to develop the Plan-Do-Study-Act improvement cycle, which W. Edwards Deming then altered to become the Plan-Do-Check-Act (PDCA) cycle still in use today.

At the same time Frank and Lillian Gilbreth were beginning to investigate the impact of human movement on assembly processes. Our friend Sakichi Toyoda over in Japan was also learning how human-induced variability, as well as control, impacted the weaving process.

Then came World War II. Consolidated Aircraft was able to build one B-24 bomber per day. Ford's Charles Sorensen thought he could improve on that rate and a couple years later the Willow Run plant was able to complete one B-24 per hour. The human aspect of manufacturing became front and center with almost all of the

traditional male factory workforce now being deployed overseas. The concept of training within industry (TWI) was born as a method to rapidly and effectively train women to work in the wartime factories. After the war TWI found its way to Japan while it faded away in the U.S., and has only recently been rediscovered back in the States.

The end of the war saw a divergence. In the U.S. Ford adopted the GM style of control management and effectively abandoned lean manufacturing. Meanwhile in Japan Toyota led the acceleration of the development and implementation of lean methods.

Toyota transitioned from a conglomerate that still included the original loom business to a company focused on the auto market. Taiichi Ohno was promoted to machine shop manager and under his watch Toyota developed the elimination of waste - and creation of value - concept. The human side was especially important to Ohno with increasing amounts of authority and control being transferred to workers directly on the shop floor.

Deming was invited to Japan in the early 1950's and gave a series of lectures on statistical quality control, demonstrating that improving quality can reduce cost. These concepts were embraced by Toyota and embedded into the Toyota Production System (TPS) leading to Toyota winning the Deming Prize for Quality in 1965. Taiichi Ohno and Shigeo Shingo continued to refine and improve TPS with the development of pull systems, kanban, and quick changeover methods. I'll explain these various concepts later in the book.

By the early 1970's the rest of the world was beginning to notice, with the first study missions to Japan to see TPS in action. Norman Bodek and Robert Hall published some of the first books in English describing aspects of TPS, and by the mid-1980's several U.S. companies, notably Danaher, HON, and Jake Brake, were actively trying the "new" concepts.

The term "lean" was first coined by John Krafcik in his MIT master's thesis on Toyota and then popularized by James Womack and

Daniel Jones in the two books that would finally trigger a wider knowledge of TPS, *The Machine That Changed the World* in 1990 (with Daniel Roos) and *Lean Thinking* in 1996. *Lean Thinking* described the core attributes of lean as:

- Specify value from the perspective of the customer.
- Define the value stream for a product, then analyze the steps in that stream to determine which are waste and which are value-added.
- Continuous flow.
- Create pull between process steps - in effect make to order in the exact amount required.
- Drive toward perfection - both in terms of quality and eliminating waste.

Those books, as well as organizations such as The Association for Manufacturing Excellence (AME), drove a widespread acceptance of lean as a path to productivity and profitability.

By the year 2000 lean methods were beginning to move out of manufacturing and into office and administrative environments. Lean healthcare, lean government, and lean construction are particularly popular right now.

Lean has taken some hits recently thanks to the Toyota recalls in 2009 and 2010. Although several independent analyses eventually showed that a significant quality issue never existed, Toyota's response to the situation was decidedly "non-Toyota." In effect Toyota had temporarily lost its focus on creating value for the customer, partially as a result of rapid growth that made it difficult to fully instill the Toyota culture into new executives at factories around the world. Recent efforts are hopeful and may be one reason why the Lexus and core Toyota brands were once again two of the top three brands in the 2011 J.D. Powers survey.

Lean sounds so easy, refined, and defined, doesn't it? Unfortunately it's not.

## The Two Pillars

The large majority of lean transformations will fail. Sorry, that's just the sad truth. It doesn't have to be this way. The reason for this failure rate is simply because lean has two fundamental pillars and most organizations don't know about let alone understand the importance of the second. These two pillars are:

- Create value from the perspective of the customer by reducing waste and promoting continuous flow
- Respect for people

Lean actually differs slightly from traditional TPS in the first pillar, with most organizations focusing on reducing waste while Toyota promotes creating flow. Although the approach is different, for the most part the tools are the same and the end goal is still to create value from the perspective of the customer.

In lean thinking there are seven primary forms of waste: unnecessary transport, unnecessary inventory, unnecessary motion, waiting, over-production, over-processing, and defects.

These forms of waste are present in manufacturing - and also in office and administrative environments. In fact, you can find them at home. Did you cook too much food for dinner last night? Did you have to wait in line to take a shower? Did you have to search for hours to find a tool in your cluttered garage?

Identifying the customer and then looking for waste - and value - from the perspective of the customer is far harder than it sounds. To add even more complexity, some forms of waste may even be necessary, such as regulatory paperwork. Some activities may appear to be waste for one customer and not another - is a long commute a waste of time? To some it is, to others it is a valuable time to relax and refocus.

I have come to believe that respect for people is probably the most important pillar - and the least understood or accepted - and therefore the primary reason why most lean transformations fail.

This pillar grew out of the concept of “autonomation” at Toyota - meaning automation with a human touch. At Toyota and in TPS machines aid humans, not vice versa. To this day when you visit a Toyota factory you will see far more humans than at comparable factories of other automakers, and robots are primarily used in dangerous processes and to lift heavy assemblies.

People are the core value-creator of a real lean organization. In fact, many lean leaders considers unused human talent as another form of waste.

Respect for people takes many forms. With employees the concept aims to create an environment where ideas, knowledge, creativity, and experience are valued. Traditional accounting practices measure the cost of the pair of hands, but do not measure the value created by the brain attached to the pair of hands. The lack of a value offset is why traditional accounting drives decisions to move factories to lower “cost of labor” countries - even if hundreds or thousands of experienced, creative people are replaced by even more people with less knowledge.

Respect also applies to customers. Problems are taken seriously and every customer is considered to be very important. This is part of why Toyota failed with their series of recalls in 2009 and 2010. Instead of holding to a strong culture of respect for customers, the company tried to battle the issue for years before the negative perception and press became too great. Imagine how different those years - and the resulting cost financially and in reputation - would have been if Toyota had publicly treated each incident as being extremely serious.

Respect should also be promoted to suppliers and the community. Engaging the entire value stream and business environment in

continuous improvement efforts and knowledge development can pay huge rewards in terms of trust, ideas, and support.

In 1990 Womack and Jones could not have anticipated the problems associated with “lean” rhyming so nicely with “mean.” Not a day goes by without some reference to a “lean and mean” organization. Real lean is definitely not mean from a people standpoint.

Real lean companies leverage productivity improvements to capture new business, thereby keeping people impacted by those improvements employed. Some real lean companies go so far as to pledge that there will be no layoffs due to lean efforts - that is often necessary to get buy-in for what can appear to be job-threatening improvement programs. And real lean companies like Toyota are generally not unionized simply because the employees are already treated with respect and often paid better than at comparable organizations.

Lean is about people. Leadership is about people - including ourselves. That’s the foundation for our exploration of how lean can help transform personal and organizational leadership.

## **Core Tools**

Note that I mentioned “tools.” Lean has birthed a plethora of tools and methods, many with nonsensical acronyms. I’ve listed many of them in the glossary but here are the core tools that we’ll use later on in this book.

**Kaizen and the Kaizen Event:** The term means “change” and is at the heart of continuous improvement efforts to reduce waste. The Kaizen Event has been popularized by multitudes of consultants who somehow believe a week is the optimal time period to create a single significant change. Hogwash. As long as you thoroughly understand the current condition and then develop, implement, and test improvements you can create meaningful change.

**Value Stream Mapping:** This is basically a flowchart that shows the sequence of steps in a process, from which you can identify wasteful and value-added steps. Typically 75% of the process steps are waste - remember you are looking at it from the perspective of the customer, not what you think needs to take place.

**Flow or Just In Time (JIT):** Aligning and balancing the sequence of value-creating process steps to reduce inventory and create steady activity and throughput.

**5S:** 5S refers to the English terms for the five steps of workplace organization: sort, straighten, sweep, shine, and sustain. By organizing the workplace you reduce inventory and thereby required space, and reduce the time it takes to find tools and parts. Organized workplaces are also safer, so some companies add safety as a sixth "s."

**Quick Changeover and Set-up Reduction:** Reducing the time it takes to set up and change from one process to another by analyzing and reordering activities. Quick changeover was the first tool we implemented to get the medical device molding operation under control and back on schedule.

**Standard Work:** A very defined sequence of activities required to complete a process. For a shop floor operator this can be the sequence of adding components to an assembly, for a manager this can be the specific metrics to be reviewed, for someone at home - especially the overly anal or neurotic (or efficient?) - this can be the morning get-ready-for-work routine.

**Go to the Gemba or Gemba Walk:** The term "gemba" means "the real place." In the lean world it is where value is being created. The factory floor, office process, or even the kitchen. Lean stresses the concept of "see for yourself" - go to the gemba and see what is really going on. You cannot get all the facts and make the right decisions by sitting in a conference room.

**Visual Management and Control:** When you walk into a lean

factory the first thing you see are lots of whiteboards and signs with metrics and status information. Team members are creating charts detailing rejects, capturing improvement ideas on flipcharts, and identifying processes by signs. Information truly is power, information is enabling, creating respect for people.

Hoshin Kanri: In it's simplest form hoshin kanri is a method to align long-term strategies with intermediate term objectives and short term improvement programs. Many lean organizations link hoshin into strategic planning activities. We'll talk much more about this later.

Mistake Proofing or Poka Yoke: Creating methods that prevent errors from occurring in the first place. A simple example is with the 3.5" diskette drive in your computer - or for the younger out there - the USB port. They are mechanically designed so the diskette or USB device can only be inserted one way.

So those are the core tools. Unfortunately many organizations become "tool heads" - and jump into a focus on implementing the tools with understanding why. All of the tools can create improvements, but first you need to ask "what is the problem I'm trying to solve?" Then and only then identify the most appropriate tool.

To compound the difficulty, many lean tools are counterintuitive - such as one piece flow being more efficient than batch processing. If you had to send out a couple hundred Christmas letters would you address the envelope, insert the letter, seal the envelope, and add the stamp one at a time? Or would you address all of the envelopes at once? Guess which process is faster with less chance for errors. Yep, completing an entire stamped, addressed envelope with letter, one at a time. Try it.

# Discovering Zen

*Zen is not some kind of excitement, but concentration on our usual everyday routine. - Shunryu Suzuki*

In many respects my discovery of Zen paralleled my discovery of lean. For the first decade or so after college I threw myself headlong into my career and the rewards that came from it. Long hours, good pay, fun toys. It seemed like a pretty good life and I looked forward to where it was headed. I did have fairly good balance with a couple good vacations a year and a solid network of friends and family.

Then life took a couple of turns. Nothing necessarily bad, but turns no less, and both having their beginnings during the timeframe of turning around the large molding operation. First, I met and eventually married my lovely wife. Second, the sideline activities resulting from my exploration of lean, including websites and being on the boards of industry association, began to grow. The result of both was the reduction of free time.

The crunch crept up on me, almost imperceptibly, and only became overtly evident after a family member began to have significant, often unpredictable, medical issues that I had to manage. Free time no longer existed, and the stress level increased rapidly. Soon I was dangerously close to cracking, emotionally, physically, and mentally. Very few people realize how close I was to hanging it all up, flying to an empty beach on Samoa, and just living incognito for a while. Seriously. I had even looked into one way flights.

Then one Thursday afternoon I did crack - but I didn't buy a one way ticket to Samoa. Instead, presumably more responsibly, I flew myself to my favorite beach in Hawaii - that evening. Just three days, just myself. Each day I would wake up and go to the pool to crank on the laptop to catch up on emails and projects. When the

laptop battery died I'd take it back inside and head to the beach for a couple hours while it charged. Repeat, and repeat. Then a margarita or glass of malbec at sunset, followed by more work back in the room until midnight or so.

I returned refreshed, caught up, and feeling centered. So after a few months I did it again. And again, and again. My wife was very supportive as she could see the positive impact. But there was one interesting dynamic: all of her female friends began asking what was wrong with our marriage, while all of my male friends wanted to know my secret for getting away with such audacity. Vive la différence! The impact must have been noticeable to more than my wife as the owners of the company I was running at the time would also fully support my last minute excursions, and would sometimes even send an email to my staff admonishing them to leave me alone for a few days. I discovered this after probing into why my work-related email volume dropped off suddenly.

After a few such trips I began to realize that the key reasons why it worked, why it de-stressed and rebalanced my psyche, was not that I got caught up - but that I got away. For a few days I was in control again, I was close to nature, I was living simply. The beach has always been special to me (and my wife - she was born in Hawaii and we were married there), and I found that a couple hours of sitting alone on a beach had a tremendous rebalancing effect. Solitude and quietude. And yes, heightened productivity. On the plane over I would make a prioritized list of projects I wanted to accomplish, and I would nail them.

I soon discovered that I could achieve a similar "mini-escape" of solitude and quietude on my commute. My commute was a bit different than what most people would expect in California. Instead of ten lanes of bumper-to-bumper traffic I went up the Pacific Coast Highway a few miles, then inland on a winding road past avocado and lemon orchards, then finally through several of the vineyards that dot this very unpopulated part of the state. Many days I saw

just one or two cars.

I learned to drive with the radio off, alone with my thoughts. I contemplated problems, but more importantly I planned my day on the drive to work in the morning, and reflected on the day on the drive back home in the afternoon. On the weekends I would take long walks on a nearly-deserted nearby beach. Eventually a true meditation practice developed that included a period of giving thanks - which does wonders to create a positive frame of mind for the day - then a formal meditation, followed by a couple minutes of formal goal-setting for the day.

The unpredictable chaos of the medical situation also made it impossible to plan more than a couple days in advance, which was a direct affront to my engineering-driven mindset. For years I fought to create control, often by micromanaging and creating backup plan after backup plan. Pretty soon I found myself sucked into a codependency that enabled the actual behaviors I was trying to prevent. Yep, time for some therapy. Really? For me, a usually rock-solid highly independent person of at least average intelligence? Ok, I'll try it. It took only one or two sessions for me to realize that the mind of a psychologist looks at the world differently than the mind of someone trained as an engineer, and that can be a good thing. First and foremost, I learned that I simply can't control every possible outcome of every problem, no matter how hard I try. So don't think so much about tomorrow, let alone waste tremendous amounts of time on layers of contingency plans. Live in the moment. Make decisions based on what is best now, and if something goes south, then and only then do something about it.

Just before the stress situation peaked and I began my Hawaiian escapes, my wife and I began thinking about moving to a new house. Our existing house was more than large enough, a unique and pleasant design, right on the California central coast with views of the ocean to boot. Why move? Because that's what people did - at least before the housing bust. The bigger and better, right? In

our case we found a beautiful Asian-inspired house surrounded by vineyards. Exactly our style. But twice as large, and more than twice the price. We set a maximum limit, placed an offer, countered a couple times, then something told us that we set the limit for a reason - and we ended up losing it.

But it didn't feel like a loss - more like relief. Especially now, looking back, and realizing that we would have bought and leveraged ourselves at the peak of the market. I still shudder to think about how different our lives could have been, upside down with a huge mortgage payment. I honestly consider it one of the cases of almost undeniable divine intervention in my life. It really feels that way.

Losing the house didn't just create a feeling of relief, it also prompted us to ask "why?" Why did we need something larger? Wow. We didn't. In fact, perhaps we should be looking for something smaller? That realization was transformative, and launched our ongoing effort to get rid of "stuff." Extra, expiring (or expired!) food in the pantry, books we'll never read again, clothes we haven't worn since the 90s. The feeling of liberation, of simplicity, is infectious.

Over the last couple year, with the medical situation thankfully diminished, I have continued to explore Zen and especially the remarkable parallels to lean. This has included formalizing a daily practice, spending some time immersed in the Buddhist culture of Bhutan, and of course the further simplification of life.

## **A Short History of Zen**

Mention "Zen" to many people in the west, well at least outside of California, and they will almost always start to think about fruits and nuts - and not the breakfast cereal variety. What kind of craziness are those pot-smoking surfing yoga instructors up to now? Dude?

But to the a large part of the rest of the world, particularly in Asia, Zen is a way of life. In some cases it is part of or even a form of religions such as Buddhism, but in others it is just a simple, non-materialistic, human-centric way of life.

Zen does not have to conflict with organized religions, and many Jews and Christians practice Zen. Even if you subscribe to a higher power it is worthwhile to look inside and truly understand yourself. Perhaps one way that higher power manifests itself is through gifts given to you - which you still need to find. Want some more assurance that you won't be taking the down escalator after a long life that includes Zen? In 1989 the Vatican released a position paper that supported the use of Zen concepts in Christian prayer.

Zen is a school of Mahāyāna Buddhism. The word Zen is from the Japanese pronunciation of the Chinese word Chán, which in turn is derived from the Sanskrit word dhyāna, which can be approximately translated as “meditation” or “meditative state”.

The emergence of Zen as a distinct school of Buddhism was first documented in China in the 7th century CE. From China, Zen spread south to Vietnam, and east to Korea and Japan. As a matter of tradition, the establishment of Zen is credited to the South Indian Pallava prince-turned-monk Bodhidharma, who came to China during the rise of Tamil Buddhism in Tamilakam to teach a “special transmission outside scriptures, not founded on words or letters”.

Thus, through Zen there developed a way which concentrated on direct experience rather than on rational creeds or revealed scriptures. Wisdom was passed, not through words or concepts, but through a lineage of one-to-one direct transmission of experience from teacher to student. It is commonly taught that such lineage continued all the way from the Buddha's time to the present.

Although it is difficult to trace when the West first became aware of Zen as a distinct form of Buddhism, the visit of Soyen Shaku, a Japanese Zen monk, to Chicago during the World Parliament of Religions in 1893 is often pointed to as an event that enhanced

its profile in the Western world. It was during the late 1950s and the early 1960s that the number of Westerners, other than the descendants of Asian immigrants, pursuing a serious interest in Zen reached a significant level.

The first Chinese master to teach Westerners in North America was Hsuan Hua, who taught Chán and other traditions of Chinese Buddhism in San Francisco during the early 1960s. Today there are many Zen centers throughout North America and the western world.

## Core Concepts

The central concept of zen is mindfulness - becoming intentionally aware of yourself in the present. Focus on the current moment by eliminating distractions and embracing solitude and stillness. The future and the past are outside of your control.

By clearing our mind of worries and regrets about the future and the past we begin to pay attention to the present. We cease to be on automatic pilot. When we pay attention we begin to understand the true essence of who we are - our values, desires, and beliefs. From that understanding we can influence the present to steer us toward a desired future, always knowing that we cannot control the future and we must continually adjust the present.

Focusing on the present is difficult. If you are doing two things at once - surfing the internet while talking on the phone, cooking dinner while watching television - you aren't being mindful. Multi-tasking, as we'll learn later, simply doesn't work. And the inability to focus and be mindful is one reason why.

Meditation is at the core of Zen, and the term "Zen" actually comes from that practice. Embracing solitude and stillness helps you become mindful, aware of yourself, of your breathing, of the thoughts flying through your head. By actively engaging with the

present through meditation you become more calm and relaxed. Eventually you will be able to find the present even in a noisy room. Imagine being calm flying through O'Hare the day before Thanksgiving. It can happen.

Beginning to meditate is difficult. Sitting alone and still in a quiet place allows us to experience all of the thoughts that keep us company throughout the day. We become aware of our breath. And at least initially we become bored. In today's hectic world we are not conditioned to be exist without an exorbitant amount of external stimulation, be it email, the phone, or Real Housewives of Orange County. Letting all of that go, even for five minutes, can be unsettling.

Koans are stories or riddles with no clear logical answer - or any specific right answer for that matter. They can drive us nuts, especially Westerners. But by focusing on such riddles we become more aware of ourselves and the sometimes counterintuitive aspects of our environment. Remember when I mentioned that lean is often counterintuitive? Now you are beginning to sense the nexus. Although zen creates focus in the present, it does not preclude having goals for the future. There is nothing wrong with goals as long as they reflect the truth that we have discovered inside ourselves. Most self-help books try to change who we are. Zen wants us to discover who we are, then use that as a platform for growth.

Striving toward simplicity in all aspects of our lives helps make it easier to experience and understand the present - to be mindful. Simplicity creates balance. Simplicity creates the ability to appreciate what Tanveer Naseer calls the "white spaces" - open spots on our calendar and in our lives. We will spend a lot of time exploring how simplicity can be applied to leadership - both organizational and personal.

Zen is humanistic, compassionate, and communal - while at the same time focused within ourselves. We exist in the present with

our friends, relatives, coworkers, and fellow citizens. By not needing to feed an ego or acquire more material goods we can better help others without comparing ourselves to them. This mindset became very evident during the earthquake in Japan in early 2011. There was no looting. It simply didn't exist. Contrast that to similar situations in other parts of the world.

## Zen and business

There are numerous books describing how zen can be applied to business so I won't regurgitate the minutiae. Zen helps leaders grow by letting us understand our true nature, in the present. Zen helps organizations grow by enabling them to understand their true values, the present state, and translating that into a long-term strategy. A strategy, with supporting activities, that is continually adjusted based on events in the present.

Our leadership lives are complex. We are bombarded by information, reports, emails, and decisions. Zen and especially a push toward simplicity can free up time and other resources. In his oft-circulated treatise titled "Things Leaders Do," GE CEO Jeff Immelt pushes leaders to "Simplify constantly - every leader needs to explain the top three things the organization is working on. If you can't, then you're not leading well."

In a 2010 study of over 1500 chief executive officers by IBM's Institute for Business Value, the number one challenge was "the rapid escalation of complexity." Over 80% predicted even more complexity in the future. So what would be the reward if we could simplify personal and professional leadership?

Similarly, modern organizations are complex and can be perceived as paradoxical. Decision inputs are complex, solutions must be out of the box. Zen teaches us to consider the unusual. Solutions created in this fashion are almost by definition competitive disruptors.

The human side of business is sometimes sacrificed to create future value. Zen brings us back to understanding the value of our people, the value of purpose, the importance of ethics. The seducing power of external reward may become overpowering without some level of reflection and introspection that grounds a leader in the present and what is really important.

# Daily Practice

COMING SOON

## Meditate

*When one is a stranger to oneself, then one is estranged from others, too. If one is out of touch with oneself, then one cannot touch others. Only when one is connected to one's own core, is one connected to others. - Anne Morrow Lindbergh*

Being mindful of the world around us is one thing, learning to be similarly aware of the world within is another - and surprisingly difficult. But once you do you become more aware of your thoughts, and the patterns of those thoughts, we're enabled to exert more control over ourselves.

By focusing inward we become aware of self-doubt, self-criticism, and rationalization, and are eventually able to recognize whether those thoughts are valid. This is why methods to focus inward, including meditation, are used extensively by mental health professionals. There can even be a physiological response, with some research showing that meditation leads to a reduction in age-related brain deterioration.

Sit quietly, perhaps beginning with only a couple minutes and working up to fifteen or even thirty. Meditation is difficult. Partially close your eyes and take a slow, deep breath and feel it enter, then exit, the lungs. Recognize inputs from your senses and from the various parts of your body. Acknowledge and accept the thoughts that will inevitably enter your head, then cast them aside by refocusing on your breathing. Sitting quietly is the easiest way to calm the senses, but eventually you will be able to meditate

spontaneously, even while walking. How do you feel? How do your thoughts change?

## Be Thankful

*Be thankful for what you have; you'll end up having more. If you concentrate on what you don't have, you will never, ever have enough. - Oprah Winfrey*

Oftentimes we become so focused on fixing problems and resolving issues that our entire sense of reality shifts. In effect we begin to live in a bubble, for better or for worse. Because they demand our attention, the negative aspects of work and life become a disproportionate amount of our thinking - and eventually our perceived reality.

Recenter and shift your perspective by grounding yourself in thanks for what is good with you, or your team. What are you thankful for? There will be more than you realize. Health, relationships, business success? Perhaps use a few minutes in the shower in the morning, the first few minutes of your meditation, or even the first few minutes of each staff meeting to identify specific people and situations to be thankful for. Make it a self-sustaining habit, a routine.

Being thankful on a daily basis creates balance between the positive and negative pressures of life and work, and places difficulties within the proper perspective.

## Journal

As you become more mindful of yourself and your world, begin to awaken to your true nature, and formally reflect on the gaps between what you wanted to happen and what really happened,

you will have a lot of “ah ha” realizations. Some will stay in your head, but most won’t - especially as you get older.

Keeping a journal will ensure you capture those brilliant sparks of wisdom. Record the plan, what actually happened, the factors causing the gap, and insights from your reflection. This same process can be applied to team meetings, family meetings, and mentoring or counseling with individuals. As part of your reflection, consider past experiences and insights that have been documented in your journal. Do patterns emerge? How do those patterns change awareness? What will you do about it?

Electronic journals have become the rage, but I still prefer hip pocket notebook. It’s always there, always available, easy to thumb through and scan, and as I’ll discuss later, the act of writing creates ownership and understanding. Experiment and discover what works for you.

## **Three Things**

COMING SOON

## **The Hour of Power**

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## **Leverage Productive Time**

Each of us has a particular time or times of the day when we’re the most productive. Learn when that is and schedule activities around it. Perhaps some part of the day is when you’re best at thinking work, another time for busy work, and another time you just need a nap. Don’t fight it. Work with it.

## Reflection

*Follow effective action with quiet reflection. From the quiet reflection will come even more effective action. - Peter Drucker*

As we become more comfortable with our thoughts and the thinking process itself, we become more self-aware. But self-awareness in itself doesn't create change. We need to consider those thoughts, our actions, and what is happening around us. This is reflection, or hansei in the lean world.

Reflection can be both an individual and a group activity - in fact it is perhaps more commonly takes the form of project reviews, post-mortems, or even an evening conversation between spouses after the kids have hit the sack. However individual reflection can be even more powerful. In any case there needs to be some core components in order for it to be effective. Reflection should be a regular, defined event. Plan it. Formally consider what the plan was and what really happened, and think about the gap. How could the activity have been improved? What can be done in the future?

Schedule time to reflect on your day, your project, and your family. Perhaps on your commute home, in the evening with your spouse, or as a formal end to a project. What did you want to happen, and what really happened? What contributed to the gap? What will you do differently next time?