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A CHIEF EXECUTIVE'S VIEW

With Dreams of the Big Leagues, an Executive Meets His Coach

By Yosef I. Abramowitz

"May I have a word with you?" David Mersky, one of my board members, asked recently. "Outside."

As always, David's voice was deep and courteous, betraying his past as a rabbi. A fund-raising consultant by profession, he has a knack for magically appearing at the right moments and saying the right things. But there's a certain trepidation a CEO feels when being summoned by a senior board member.

"How are you doing with the new baby?" he asked, as we took a walk around the block of my organization's Newton, Mass., offices. "How are things at work?" My fourth child, Ashira, arrived on Father's Day, weighing 8 pounds, 2 ounces, and sporting a birthmark on her right cheek that looks remarkably like a peace sign. A nice omen in a crazy world.

As David and I rounded Chestnut Street, I was still unsure what message he was delivering. But with each step, our conversation seemed to be ascending toward a Big Picture.

We turned onto Oak Street and David came to his point. "I have been speaking with some of the other board members, and we were wondering if at this stage in the organization's development it would be helpful to you to have a CEO coach."

As I processed his words, I realized they could be construed as an insult. With the board, I'd helped the organization, Jewish Family & Life, grow by leaps and bounds in the past several years. For the first time we will likely break \$4-million in annual donations, miraculously up 25 percent over the past two years, a time when the nation's economy has been weak.

But I've always believed that a good CEO constantly learns and grows. I'd also recently come across a sobering article while on the shuttle between Boston and New York that highlighted how founding entrepreneurs rarely make good CEO's. Seven years ago, I co-founded our nonprofit group in my basement with no money but with big dreams. Now I was clearly being tested by the increasing faith of our donors.

So I gratefully accepted the offer, realizing my board was giving me an opportunity to transcend the limits of my current abilities and training.

The CEO coach my board selected turned out to be Judith Lieberman, whose past clients include top executives at Apple, Harvard Business School, Hewlett Packard, IBM, and Visa International. The plan was for her to get to know my strengths and shortcomings and then work with me over the next four months to find ways to put my time and talents to best use.

To start, my coach gave me a series of standardized tests to determine my personality and leadership style. I, who didn't exactly ace the SAT's, took particular pleasure in zipping through these exercises in record time, and was pleasantly surprised with how accurate and informative a picture they formed. My coach was also testing our chief operating officer and my executive assistant so that she could see how our skills and personalities fit together as a team.

One test -- known as the Myers-Briggs Type Indicator (named after the two psychologists who developed it) -- found that I tend to be an introvert who takes in information using intuition. I make decisions using objective analysis rather than emotions. And I prefer to be organized and make decisions quickly. Using the Myers-Briggs shorthand, this makes me an "INTJ" personality type.

Other findings from the test showed that I'm "resourceful in dealing with new and unusual experiences" and "readily envision what is needed for the future and enjoy strategic planning." While I'd like to be organized, the test said, I'm still very challenged when it comes to managing my time, and I'm way too tense. After hearing these findings, I confessed to Judith that I don't get enough sleep.

"We're going to work on that and your time management," she replied rather scientifically.

On my Entrepreneurial Quotient test, I scored a 94 out of 100 -- an unusually high score, I'm told; in a test of management skills, I scored an 89 out of 100, with 70 being the average for successful entrepreneurs. The tests revealed high marks for being innovative, forward thinking, and optimistic. My main trouble spots are being too willing to take risks and not conscious enough of details.

This profile fits with my own assessment of my recent leadership, particularly in the area of fund raising. While we have been lucky enough to attract a handful of large grants because of my inclination to dream and innovate, the day-in and day-out logistics of raising steady general support has been very weak. Thankfully my board has tried to hire around my weaknesses, first with the addition of a top-notch executive assistant for me last fall and now with the selection of a new director of development -- our third in three years -- who can make sure the grant applications are out on time.

Judith's next step was to do a 360-degree evaluation, during which she spoke with three board members, two key staff members, two important donors, and my wife. At our next meeting, my coach painted a complete picture of how I'm viewed based on the interviews, while she protected the confidentiality of the specific sources.

"Perception is reality," she kept telling me. "So you have to work on your communications. While we work on your weaknesses, keep playing to your strengths of envisioning and implementing big-picture goals and programs."

This process, I hope, will help me figure out how to create this kind of balance.

For the past two years, the charity has continued to expand its reach and budget, but more ambitious goals have had to take a back seat. Now, our leadership is asking me to give them a draft of my vision for where the organization should be heading. Walt Winshall, a high-technology leader and board member, has summed up the new charge by saying: "Dream as if finances were not an issue."

Cool.

And yet I can't help being haunted by the feeling that there is a danger in voicing out-of-the-box visions, or what the management expert Jim Collins calls "big hairy audacious goals," which he says are necessary for great enterprises. If I tell my board and donors where I really think we can be in 5 to 10 years, will they think I'm crazy?

Our recent board retreat provided the first real test of how far I'd be willing to go, and true to my profile, I didn't hold back in my proposals. While the most audacious goals were not treated too seriously, the board did take a surprising turn: They took on the process of developing a vision themselves, pushing everyone, including me, in challenging directions. I felt more powerfully than ever before that our organization's future did not rest only on my shoulders and was no longer constrained by my own limitations. And that night, I slept well.

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