DETERMINANTS IN ATTAINING
THE POSITION OF CHIEF EXECUTIVE OFFICER

by

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A thesis submitted in conformity with the requirements
for the degree of Doctor of Education
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Determinants in Attaining the Position of Chief Executive Officer

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Abstract

The purpose of this study was to make explicit the factors that lead to the attainment of a position as a Chief Executive Officer (CEO) of a major corporation. In order to fulfill this purpose, qualitative research methodology was used to collect the data. Participants were nine CEOs of major Canadian corporations. The only parameters placed on the sampling process were that three CEOs were to be chosen from each of the private, public, and voluntary sectors and at least one of the three participants from each sector was to be a woman. No attempt was made to match participants on any other defining characteristic such as place of birth, age, religious faith, marital status, or the length of tenure with a corporation or as a CEO. Revenues of the corporations were to be in excess of $30,000,000.

The results of the study show that self-confidence is an important factor in attaining this position, although it is developmental in nature. At some point, the participants saw themselves as being capable of handling the demands of the position. Though academic achievement is a factor in attaining positions at a less senior level, it is a reputation for consistently producing outstanding results that is a key determinant in attaining the position of CEO. Personal traits that distinguished the participants include the ability to conceptualize problems, find creative but practical solutions, and inspire others to implement them. Other characteristics include a passion for excellence, commitment and dedication to their work, personal accountability, and integrity. It would
appear that prestige and money were not determinants that underpinned their occupational choices. Rather, occupational interests appear to have been the means to find a resolution to an existential problem or over-arching tension that developed during the years they were growing up. Thus, their motivation to aspire to positions of leadership was underpinned by a need for achievement, social recognition, autonomy, affiliation, change, or a combination thereof.

Mentors played a role in the success of some of the CEOs. In the early stages of their careers, mentors offered encouragement and provided opportunities for practical experience in the development of their leadership skills. There is no doubt that chance events were a contributing factor in attaining a position as a CEO for about a third of the participants. However, the consequences of the event could not have happened without some previous action on their part. They had made choices that placed themselves in the right place at the right time to take advantage of these fortuitous events.

Gender differences were negligible, although the women perceived that they would not have attained the position without a graduate degree. The phenomena of the glass ceiling was not an issue.
Acknowledgements

Ten years ago in a classroom at OISE, I participated in a University of Toronto Extension Course titled, Recreating Your Life’s Journey. During those seven Wednesday afternoons, I had no idea that the process would precipitate a dramatic shift in my career and that one day I would be writing a doctoral thesis. Many people have been extremely supportive and encouraging as I made the transition and wrote this document.

First, I would like to thank my wife for giving me the opportunity to make such a dramatic change in mid-life. I could not have done it without her patience, understanding, and support—both emotional and financial. I would also like to thank my son for his patience and understanding when I wasn’t as available to him as I would have liked and I usurped the family computer for extended periods of time.

I also had a wonderful committee for which I am extremely grateful. They were fine companions for this part of my life’s journey. All were very helpful and encouraging throughout the research process. I would like to thank my committee supervisor, Dr. Sabir Alvi, for his support and understanding throughout the process. Even though he had moved to Montreal, it was like he was in the city. I could always count on getting speedy replies to my e-mails. My sincere appreciation is also extended to Dr. Steve Lawton for his guidance and helpful suggestions in writing the analysis chapter and to Dr. Kenneth Leithwood for his ideas on how to enhance the quality of the CEO profiles.

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There are many others who were extremely supportive and encouraging during these years: friends, colleagues, professors, advisors and class-mates. Their interest was
a real motivation to keep going when times got tough. I would especially like to thank a recently retired teacher and family friend, Christina DeCarlo, for her assistance in editing the final chapters. Her thoughtful questions and helpful suggestions helped to enhance the clarity and the quality of the written text.

Without the grace of God, what has been accomplished in the last ten years would not have come to fruition. It has been the most exciting ten years of my life and I look forward to using what I have learned to help others on their life journey.
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Chapter 1

Introduction

They are visionaries, strategists, and risk-takers. The culture of the organizations in which thousands of people work is ultimately determined by these individuals. Millions of dollars are under their control. The success of their companies is dependent on their effectiveness as leaders. They are often the organization's chief spokesperson. Yet, with a few exceptions, they are not household names. Who are these people? They are the Chief Executive Officers (CEOs) of major corporations.

How did these men and women attain such a position of eminence and status? Surprisingly, little research has been carried out to find the answer. Most research has focussed on hiring trends, vocational history, and the personal attributes of leaders. This, I believe, is an outcome of the positivist paradigm that has underpinned research in vocational psychology for many years. Therefore, the purpose of this study is to make explicit the factors which lead to the attainment of a position as CEO of a major corporation.

Initially, to establish its identity as a legitimate specialty, vocational psychology had to build a base of professional and scientific literature (Gelso & Fretz, 1992). In order to do so, it was necessary to conduct empirically based research studies that used large sample sizes and powerful statistical techniques. However, much of the current research in vocational psychology continues to be closely tied to this methodology (Fouad, 1994; Richardson, 1993). Though these types of studies were useful in the developmental stages of vocational psychology, they are not always the best way to obtain insights into the complexity of career choice and vocational fulfilment. As Bakan (1972) point outs, “Authentic psychology must also concern itself with reflexivity: the effect of thinking, feeling and willing” (p. 28).
There was a short period in the 1950s and early 1960s when some attention was paid to the effect of one's needs, impulses, and motivations upon vocational choice. But studies conducted within this framework were not widely accepted and in the intervening years, the majority of vocational research continues to be focussed on trait and factor theories, developmental and stage theories, and social learning theory. However, there is a movement within vocational psychology calling for an integration of theories or the development of a theory which would take into account the dynamic interaction of a person's life events, decisions, beliefs, values, personal attributes, and the effect of sociocultural factors upon their lived experience (Vondracek & Kawasaki, 1995). Although the primary purpose of this study is to make explicit the factors which lead to the attainment of a position as CEO of a major corporation, the present study should provide data that could contribute to future research in this domain.

Focus of Study

The over-arching question posed by this inquiry is: What are the determinants that lead to the attainment of a position as Chief Executive Officer (CEO) of a major corporation? Related to this central question are the following specific questions:

1. Are there environmental and/or sociocultural factors that are common to those who attain the position of CEO?

2. What are the personality characteristics, internal motivations, beliefs, and values of CEOs?

3. What decisions were made that may have significantly impacted upon their successful attainment of such an eminent position of leadership?

4. Are there discernable patterns in these people's lives?

5. Are the determinants different for females who attain positions as CEOs than for males who attain such positions?

6. Are there differences in the profiles of CEOs in the various sectors: private/public/voluntary?
Rationale for Study

Personal Interest

One of my interests in studying the lives of CEOs stems from spending many years in senior positions within corporate environments. Although successful in terms of progressing through the corporate hierarchy, I had only fleeting periods of enjoyment in any of the positions of leadership that I held. For many years, I was acutely aware that I had no aspirations to take on the role of a President or CEO. So, not surprisingly, when the opportunity arose seven years ago, I made a dramatic career shift to become a counsellor specializing in vocational and personal transitions. As Bordin (1990) points out, "A person's life can be seen as a string of career decisions reflecting the individual's groping for an ideal fit between self and work. It is this fit that transforms the imperative to work (in order to survive) into a vocation. This fit is the means through which necessity is converted into self-fulfillment" (p. 109). At least part of my interest in studying the lives of CEOs is the insight I will gain from exploring their vocational journeys to attain positions of distinguished leadership. It will be interesting to compare it with my own to gain further insight into why I abandoned the corporate world to find vocational fulfillment elsewhere.

Not surprisingly, I have had a long-standing interest in the area of human potentiality. Since the early 1970s, I've read numerous books and articles on the subject. Ten years ago, the quest to realize what I felt was untapped potential led to enrolment in a University of Toronto extension course titled, "Recreating Your Life's Journey". Over the span of seven weeks, I reflected upon the significant people who had either accompanied me on my journey or I had met along the way, the events and turning points that had added unexpected twists and turns, and the decisions that were made that changed its direction. As I reviewed my life, patterns began to emerge and I gained some insight into my life. The outcome of that seven-week course was to change my life. I continue to be interested in
human potentiality, but increasingly, from the perspective of helping others realize their potential for personal growth and fulfillment. Studying the life journeys of eminent CEOs should contribute to my knowledge in this area and assist others in their quest of personal growth and fulfillment.

A third reason for conducting this study is my life-long interest in learning. What we choose “to know” determines the extent to which we can skillfully function in any particular area of our lives. Conducting this study will not only increase my knowledge in vocational development so that I will be a more effective practitioner but it has already prompted me to examine how I will work with clients in the future.

Significance of the Study to Research Literature

Minimal attention has been paid to the psychodynamic vocational model due to the difficulty of empirically validating or refuting its complex and intricate concepts (Osipow, 1983). With the growing acceptance of qualitative research as a valid paradigm, it has now become possible to conduct studies that make explicit the intrinsic needs, motives, and satisfactions of those who have achieved vocational success. Further, the design of this study provides the opportunity to examine the interaction of sociocultural factors and personal attributes upon one's lived experience.

This study is unique in that no psychologically based, in-depth study of eminent CEOs is cited in the literature. Further, career counsellors should find the results of the study helpful when working with clients who aspire to positions of leadership within organizations. As Brill (1949) suggests, “Most of the failures in life are owing to one's trying to do what one is unfit for or unwilling to accomplish” (p. 297).

Much is still being written of gender-related differences in the career development of women. In the past decade, Cook (1991), Jepsen (1992), and Watkins & Subich (1995) have documented an extensive array of research studies that were carried out in this
domain. The present study will be unique in its contribution to this domain of research literature as it focuses exclusively on gender differences in the career development of women CEOs.

As noted, there is a movement within vocational psychology calling for an integration of theories or the development of a theory which would take into account the broad mosaic of unfolding life experiences (Sonnenfeld & Kotter, 1982; Vondracek, Lerner & Schulenberg, 1986; Vondracek & Kawasaki, 1995). The design of this study has the potential to contribute to this area as well.
Chapter 2

Literature Review

Career Development of CEOs

As indicated at the outset, research on the career development of CEOs is scanty. After an extensive search of the ProQuest Management database, which contains articles from over 1000 business periodicals and journals, only two studies were located. The more recent of the two (Payne & Jeffrey, 1995) identified a number of recent trends which indicate CEOs with operations and manufacturing backgrounds are being appointed much more frequently to positions in large industrial corporations in the United States (US). Their sampling of 464 CEOs of the largest public, industrial, and service companies as well as a survey of the readers of Chief Executive revealed that fewer CEOs with administrative, legal, and financial backgrounds are being appointed. Since 1993, the average age of newly appointed CEOs is 54, three years younger than the average age of 57 for all CEOs included in the sample. The other study (Piercy and Forbes, 1991) traced the career paths of 230 chief executive officers. Using the list of top American Corporate Executives as published by Forbes magazine in 1988, these researchers analyzed biographical and career data found in the 1988/89 edition of Marquis' Who's Who in America. The analysis revealed that "although no two executives followed exactly the same path, and lines of demarcation were not always clearly drawn, there were seven identifiable phases of career development and progression" (p. 20). Since the study's focus was on the major events and transitions in the careers of these CEOs, it made no attempt to take into account motivational or personal characteristics that may also have contributed to their success.

A search of the books available on the careers of CEOs and presidents yielded one title (Aird, Nowack, & Westcott, 1988) that related to CEOs in Canada. Largely focussed on
the duties and responsibilities of the CEO, the study examined personality traits and the job
skills needed to be a CEO, with some attention paid to the role of mentors, family
background, and career progression.

**Personality**

Several personal profiles of chief executive officers were also located (Bamford, 1986; Carr, 1990) as were several articles that examined CEO career advancement (Bekey, 1989; Kaplan, 1990; Malaspina, 1990) and career satisfaction (DeVries, 1994; Forbes, 1987; Johnson, 1992). One short article (Divita, 1995) was found which focused on the
impact of personality and motivation upon career development. This article related an
anecdote of a vice president in his fifties who sought a CEO position as a logical career
progression. However, an analysis of his personality profile indicated that he did not have
the motivation to make a lot of money, nor the capacity to be creative, innovative, or an
agent of change. What he needed was a position in which he would interact with people but
did not require him to make decisions or handle overly detailed information.

A number of studies in the psychological literature have compared personality
characteristics of CEOs with the type and structure of the organization they lead (Hornady &
Aboud, 1971; Lewin & Stephens, 1994; Miller & Droge, 1986; Moretti, Morken, & Borkowski,
1991; Roth, 1995). Rytting, Ware, & Prince (1994) compared CEO Myers-Briggs Type
Indicator (MBTI) preferences with the typological character of the organization they lead.
No overall bias toward any particular type preference was found for moderate-size
companies. However, introverted sensing and feeling types were found to be over-
represented in family-owned companies. The character of the organization was found to
reflect the typology of the CEO. Similarly, Ginn (1994) explored the psychological profiles
of 42 Canadian and 70 US commercial airport directors and found that the larger the size of
the airport, the more there was a preference of the CEO toward intuition.
Armstrong & Piotrowski (1991) studied the personality of 30 CEOs using the transcripts of the CNN telecast "Pinnacle" and noted that CEOs seemed to be naturally people oriented and viewed work as fun. An overall portrait of an enthusiastic, focused, energetic yet caring individual emerged. Studies by Glenn (1985), Margerison (1984), and Margerison & Kakabadse (1985) studied personal characteristics that were considered key qualities of CEO's. These included a need to achieve results, interpersonal skills, a willingness to take risks, and a reliance on their own judgment when making decisions.

Managerial Intelligence

Sternberg (1997) suggests that managerial performance requires a broader perspective of intelligence than the academic aptitude, or so-called "general intelligence" (g) measured by IQ tests. He proposes a three-part "triarchic" theory of intelligence: analytical intelligence, practical intelligence, and creative intelligence. Analytic intelligence is the ability to plan, monitor, and evaluate one's problem solving. Practical intelligence involves the ability to adapt to environments but also to shape and select them. It is instrumental to the attainment of goals that people value and its acquisition has been found to be uniquely important to competent performance (Sternberg, Wagner, Williams, & Horvath, 1995). Creative intelligence is the ability to see problems in new ways and to escape the bounds of conventional thinking. Sternberg believes that this type of intelligence has become very important with the rate at which the world is changing.

To account for the phenomena that people with high IQ flounder and those of modest IQ can do surprisingly well, Goleman (1995) posits yet another type of intelligence. He suggests it is one's emotional intelligence that is critical to success. Largely independent of one's general intelligence, it is comprised of three qualities: self-awareness, self-discipline, and empathy.
Motivational Needs and Personality

Every individual has psychological needs which Murray (1938) defined as the internal directional forces that determine how people seek out or otherwise respond to objects or situations in the environment. These needs or motives, which underlie most of the range of important human behaviour, form patterns that determine people's personalities. In the 1930s, he and his colleagues developed a catalogue of these motivational needs, with an emphasis on the secondary or psychogenic ones which he felt were the most important to human behaviour.

Murray (1938) believed that everyone has each of these needs and a dispositional tendency toward some particular level of each need. The strength of a need is determined partly by external events which exert a motivational influence on an individual to either obtain or avoid something and which Murray referred to as "press". Although each need stands on its own, Murray argued that needs can also be interrelated in several ways. Needs sometimes fuse with each other, so they're reflected in the same act. Needs can also act in the service of one another, or needs may conflict with one another. Murray also used the term "thema" to refer to a pattern of press and need that coalesce around particular interactions. In his writing, Murray abbreviated needs by the letter 'n' followed by the object of the need, which is capitalized. (e.g. the need for achievement is written as n Achievement). This format has been adopted by many writers and will be used when discussing the motivational needs of the participants.

Values Held by Executives

National culture has been found to be one of the predominate influences upon the values of American business executives. (Bendix, 1956; Sutton, Harris, Kaysen, & Toblin, 1956; and Chatov, 1973). Their values can also been affected by social factors such as wars, depressions, disasters, or major social movements (Jacob, Flink, & Schuchman,
Family characteristics such as class, race, and religious upbringing have also been shown to be strongly associated with variations within a culture (Rokeach, 1968, 1973).

At the occupational level, a self-selection process appears to occur. Allport (1970) reported that the values of students majoring in business administration were significantly different from students in other fields, notably emphasizing economic and political values and deemphasizing social and religious values. This research was supported by that of Rawls and Nelson (1975) who found a significant correspondence between MBA students' values and their intentions to enter certain types of industries. The results of research by Hambrick and Brandon (1988) suggested that organizations convey something of themselves in attracting employment candidates, and in turn, seek to hire individuals whose values fit the setting.

**Intrapreneurs vs. Entrepreneurs**

Some studies (Hornaday & Aboud, 1971; Piercy & Forbes, 1991) have shown that CEOs who have risen through the corporate hierarchy differ on some personal attributes from CEOs who have inherited family businesses. Similarly, in their study of CEOs, Jennings, Cox, and Cooper (1994) focused on the differences and similarities between CEOs who progressed through the corporate hierarchy (intrapreneurs) and those who started their own businesses (entrepreneurs). They found differences relating to childhood, social-economic status of the family, education, and personality. However, included in the intrapreneur group were CEOs that had inherited family owned businesses.

**Recent Literature**

Since undertaking this study, a number of books have been published on CEOs. Benton (1996) surveyed over a hundred CEOs to establish the twenty-two vital traits that are needed to successfully reach the top. Again, many of the CEOs included in the survey...
were entrepreneurs and inheritors of family businesses. Differences between these types of CEOs and those who progressed through the corporate hierarchy were noted. In a chapter titled, "How Chiefs Become Chiefs", factors such as the CEO's upbringing, education, the value of mentors, and networking were discussed. Included was a list of previous job titles that had been held by some of the CEOs as they progressed through the corporate hierarchy. The role of luck and the ways CEOs handled setbacks were briefly discussed.

In his book, *How to Become A CEO*, Fox (1998), a marketing executive in the US, posited the rules he feels are required to rise to the top of organizations. These included avoiding staff jobs, not expecting the personnel department to plan your career, and promoting yourself within the organization. In his volume, John Rau (1997) shared data gleaned from the files of the search firm in which he is employed to document what he feels it takes to get ahead in the corporate jungle. His information was based on what their firm's clients were seeking when hiring senior executives. In ranking the attributes, a reputation for results was first, with interpersonal and communication skills tied for second. The ability to think strategically, a previous comparable position, and a fit with company culture were ranked third, fourth, and fifth, respectively. Less than half his sample was comprised of CEOs.

**Gender Issues**

A search of the ProQuest database and psychological literature revealed a number of articles and studies dealing with the barriers that women face in attaining CEO positions. Stereotyping, preconceptions, and subtle discrimination against women were cited in both a Canadian study (Burke, 1993) and a US study (Fierman, 1990). Other impediments to attaining executive status appear to be centered on parent-child relationships including child-rearing responsibilities, women missing their children, or missing not having had
children (Fierman, 1990; Miller, 1989). In three studies, (Anonymous, 1991; Kemmer, 1989; Keown & Keown, 1985) women mentioned the assistance of mentors in attaining their positions. One successful CEO, Bettye Martin Mushan, CEO of Gear Holdings, believes that if women are willing to take a long-term view of networking, prospecting, and selling, they can overcome society's male dominated networks (Farinelli, 1994). Interviews with 55 women executives revealed the mastery of political skills is a necessary and vital aspect of women's career advancement (Mainiero, 1994).

Vocational Theory

Vocational psychology has witnessed the development of numerous approaches over the past forty years. The earliest theory (Parsons, 1909) posited that a congruence between an individual's aptitudes, interests, needs, and values and the environment in which he/she worked would be predictive of occupational performance and satisfaction. Known as trait-factor theory, the model proved to be widely utilized by vocational counsellors in their practices and is foundational to Holland's person-environmental typology (Holland, 1973, 1985; Weinrach & Srebalus, 1990). The central premise of Holland's theory postulates that vocational satisfaction, stability, and achievement are largely determined by the congruence between one's personality and the environment in which one works. There are six types of personality and work environments: realistic, investigative, artistic, social, enterprising, and conventional.

Dawis & Lofquist's theory of work adjustment is one of the most comprehensive of the trait-factor theories. Developed as part of the Minnesota Studies in Vocational Rehabilitation in the mid 1960's (Dawis, England, & Lofquist, 1964; Dawis, Lofquist, & Weiss, 1968), Dawis & Lofquist's (1984) theory describes key components of both the individual and the work environment and specifies how the correspondence between the two is related to subsequent outcomes. Work adjustment is defined operationally as tenure
on the job and work adjustment is a function of the extent to which the worker is able to
successfully perform job responsibilities and the correspondence between the individual's
vocational needs and values and the reinforcement systems of the work environment (Betz,
Fitzgerald & Hill, 1989).

In 1957, Donald Super, then using the trait and factor approach model, augmented it
by including a construct that took into consideration the predictable vocational tasks that
individuals encounter as they develop their careers (Super, 1957). According to his model,
a person's lifetime can be divided into five states and in each of the stages an individual is
faced with tasks related to vocational development. The rate at which a person develops is
determined in part by his or her psychological and physiological attributes and in part by
environmental agents.

The first stage which Super (1957) has labelled "growth" covers the years from birth
to approximately age 14 and includes the years an individual spends in elementary school.
The second stage, "exploration", extends from approximately age 15 to age 24 and includes
those years one usually attends high school and university, then enters the workforce or
pursues a graduate degree. The years from ages 25 to 44 are those in which an
individual's main vocational task is to establish themselves in an occupational field: Super
labelled this "the establishment stage." The next stage, "maintenance", covers the years
from age 44 to 64. During this period, a place has been made in the world of work and
efforts are directed to building it along established lines. The last stage, which Super
labelled as "decline", begins at age 65, when an individual usually retires and new roles are
developed.

Central to Super's theory of career development are the constructs of self-concept
and self-concept systems (Super, 1963). Self concepts are seen as pictures that an
individual has of himself or herself in some role, in some situation, in a position, or in
performing some set of functions (Super, 1963). Since understanding of one's self cannot
develop without comparison and contrast with others, self-concepts include an awareness
of the similarities and differences between one's self and others. Hence, self-esteem and
self-confidence are integral meta-dimensions of self-concepts. As a person matures, the
self-concepts coalesce into a system of self-concepts.

One of an individual's self-concept systems is the vocational self-concept. It
embraces the various self-concepts believed to be relevant to vocational choice and
success, and which have been translated into a vocational preference (Super, 1963). For
example, an adolescent may see one's self in relation to others as tall, poised, athletic, and
smart. This recognition, in turn, leads to decisions about education and work that are
consistent with those self-concepts (Osipow & Fitzgerald, 1996).

Like all self-concept systems of an individual, over the span of a lifetime, the
vocational concept develops and changes as the individual progresses through their career
(Super, 1963). In each of the stages, vocational maturity is measured by the congruence
between vocational behaviour and the expected vocational behaviour. The closer the
correspondence between the two, the greater an individual's vocational maturity.

In 1981, Super further refined his theory to emphasize the role of self-concepts in
career development. Although the original theory had asserted that occupational choice
implements a self-concept, the new theory explicitly articulated the processes involved in
the formation, translation, and implementation of a self-concept including how self-concept
affects vocational behaviour (Savickas, 1997). Super (1990) again refined his theory by
adding a contextual perspective that deals with social roles. He shifted the focus from work
roles to the constellation of all life roles and the theory has now become known as "Life-
span, Life space" (Super 1990; Savickas, 1997).

Subsequent theories, notably Ginzberg (1972) and Tiedeman (Tiedeman & Miller-
Tiedeman, 1975) included Super's constructs of developmental stages, career patterns, vocational maturity, and vocational self-concept. In the late 1970s, Levinson (Levinson, Darrow, Klein, Levinson, & McKee, 1978; Levinson & Levinson, 1996) also postulated a time- or age-linked developmental process which became known to the public through the national best-selling books of Gail Sheehy (1976, 1995).

In the mid 1970s, Krumboltz, Mitchell, and Jones (1976) introduced their social learning theory which stressed the effects of one's learning experiences in the first two or three decades of life upon vocational development. The theory was widely accepted by counsellors and its constructs continue to be the focus of numerous research studies (Fouad, 1994). Other theorists (Blau, Parmes, Gustad, Jessor, & Wilcox, 1956; Hollingshead, 1949; Miller & Form, 1951) have looked at the role that social influences play in the choice of occupations that are available to individuals.

The cumulative effect of one's decisions upon occupational success has been studied by a number of researchers (Gelatt, 1962; Hershenson and Roth, 1966; Katz, 1966; Jepson & Dilley, 1974) and Krieshok (1998) wrote an extensive recapitulation of research that has been carried out in this domain.

Of particular interest to the present study are the models that were developed in the late 1950s and early 1960s (Roe, 1956; Bordin, Nachtman, & Segal, 1963; Galinsky & Fast, 1966) and were based in psychoanalytic theory. These theories took into account the influence upon vocational choice of the pattern of needs that develop in the first six years of childhood. However, the theories fell into disrepute because the validity of the constructs were not well articulated and were not easily supported by empirical research. Since then, some of the constructs from this perspective have been integrated into other vocational theories such as Holland (1973), Super (1981), and Krumboltz, Mitchell, and Jones (1976). Vocational theorists who advocate a convergence of vocational psychology
with the other psychological sciences have in recent years seen the enormous potential of this integration of vocational psychology with personality psychology (Savickas, 1995), an example of which is Watkin's (1984) vocational theory, based upon Adler's Individual Psychology (Adler, 1956), the constructs of which take into account many of the corollaries of various theories.

As Brown and Watkins, Jr. (1994) have pointed out, psychodynamic theory has changed substantially since its introduction by Freud in 1909. Object relations and ego psychology theories have advanced rapidly and significantly in the last half century and have certainly had an impact on career theorizing (Bordin, 1990). Some points of convergence include the construct of embedded identity, the impact of relationships on the career development process, the role of the family in shaping career identity and development, and the implications of early childhood on one's life.

The Use of Narrative in Meaning Making

In the last five years, there has been some shifting in career counseling from the exclusive use of objective, scientific, and rational methods that measure the traits and personality of an individual to a methodology that helps clients make meaning of their lives—that is, to see a person's career as a story.

To understand the movement of their lives, Savickas (1995a) and others (Cochran, 1997; Ochberg, 1988) focus their attention on the stories a client tells. For it is in these stories, clients will reveal their life theme. A life theme consists of "a problem or set of problems which a person wishes to solve above everything else and the means the person finds to achieve a solution" (Csikszentmihalyi & Beattie, 1979, p. 48). Its source is an overarching tension or stressor that was experienced in childhood (Emery & Csikszentmihalyi, 1982).

Though the problem may be perceived or experienced either consciously or
unconsciously, it constitutes a fundamental source of psychic stress for a person and triggers adaptive efforts to solve it. Occupational interests are a means to solve it (Savickas, 1995a). In one's work, unfinished business from childhood can be addressed and old issues worked out in a new situation (Savickas, 1997a). It often seems to be the case that one's occupational career choice corresponds with the chosen method for solving a central existential problem (Csikszentmihalyi and Beattie, 1979).

In Savickas' (1995a) postmodern theoretical framework, motivational needs, values, and interests are given a unique slant: "Motivational needs are strivings, in that a person seeks things that make him or her feel more secure (Savickas, 1995a, p. 195)." Values define a person's goals (Savickas, 1995a), and give an individual a sense of direction and incentive (Ochse, 1990). Occupational interests are the bridge by which a particular individual pattern of development crosses over to its major social role in our culture" (Darley & Hagenah, 1955, p. 191). They are the "developmental path that leads to opportunities for integrative adaptation, maximal development, and self-fulfilment" (Savickas, 1995a, p. 193).

When working within this framework, counsellors not only determine the client's life theme but they also identify the client's role models for they serve as the templates that individuals use to design their own lives (Savickas, 1995, 1997). Since people typically have more than one role model, it is the overriding commonalities that connect these figures that reveal the essential goals of the client. The counsellor then creates a narrative to allow the client to understand the origins of their occupational interests, as well as their meaning and significance (Savickas, 1995a). The narrative forms a fictive truth and personal mythology that provides a framework for knowing how occupational interests were a solution to the over-arching tension of their childhood and how the client turned problems into strengths.
Role of Chance in Career Development

Although unplanned events affect everyone's career, the paradigms used by career counsellors remain focussed on the Neo-Parsonian model of career choice and vocational development which ignore the effects of chance upon one's career (Miller, 1983; Williams et al., 1998). As Scott and Hatalla (1990) suggest, "The thought of including chance factors such as unexpected personal events into the theory and practice of career counseling is disconcerting because it is, by its very definition, unpredictable and untidy" (p. 28).

Bandura (1982) pointed to the same issue in psychological theories and suggested that neither personal proclivities nor situational imperatives operate as independent shapers of the course of lives. Chance encounters affect life paths through the reciprocal influence of personal and social factors. Individuals contribute to their own destiny by developing inherent abilities and capacities that afford them access to particular social milieus. Krumboltz (1998) recently stressed this same point when he proposed that counsellors teach clients how to generate beneficial unplanned events for themselves.

Cabral and Salomone (1990) suggest that chance seems to operate on a continuum, from events or encounters that are totally unforeseen such as a natural disaster to those that are at least partly under the control of the individual such as deciding to enter graduate school after learning about a newly-emerging field. Wallach (1994) views chance events from the vantage point of four perspectives encompassed within Cabral and Salomone's continuum: luck by accident, luck in retrospect, luck by opportunity, and luck by design—the latter two categories being synonymous with the views of Bandura (1982) and Krumboltz (1998).

Summary

One of the criticisms of the career literature is that it is almost exclusively focussed on adolescents and young adults. With research designs that involve college and university
students, little attention has been paid to other age groups. Furthermore, researchers continue to favour the positivist paradigm and theoretical approaches such as those based in psychodynamic psychology are difficult to validate with this methodology. However, as Brown and Watkins Jr. (1994) pointed out, more researchers are beginning to believe that qualitative methods might do a better job than traditional methods in gaining a fuller appreciation of the person as an agent of his or her own career development.
Chapter 3

Methodology

Use of Qualitative Research Methodology

Savickas (1995) indicates that "theoretical issues of vocational psychology are demanding that theorists and researchers in vocational psychology use all available approaches to produce more scholarship and research that rigorously contextualizes vocational behavior; focuses on meaning and interpersonal relationships; emphasizes relationships between work and race, gender, and class; integrates vocational psychology with other disciplines; concentrates on self-definition, and self-determination; informs counseling practice; addresses public policy; and deals with social problems" (p. 29). In studying the career development of CEOs, the use of qualitative methodology should facilitate gaining access to this type of information. As Bordin (1990) points out, "We cannot expect to find evidence of [unconscious] processes by simply asking a person what wishes or desires have governed the series of decisions that have marked his or her career. It should, however, be possible to infer these enduring orientations from a careful examination of the individual's life history, especially by examining feelings, fantasies, dreams, and other imaginative responses directed to past, present, or future" (p. 106).

Ochberg's (1988) study of two middle-aged businessmen reveals the potential of using qualitative research methodology to explore vocational issues. Using the biographies of two businessmen, Ochberg was able to show the connection between their careers and the longing and frustrations of their childhood. In part, this was revealed by the characters that populated their stories and by the formal shape of their stories' plots which emphasized relentless forward movement.
The Research Question and Methodology

Since not everyone aspires to, or successfully attains the position of CEO, the focus of the study was the exploration of the factors that led to the attainment of the position. Rather than follow past research designs, which tended to focus exclusively on either the career history or personal characteristics of the participants, this study was designed to explore these attributes in the context of lived experience. Because the study is essentially exploratory in nature and is an attempt to try to understand and to help generate a theory of how individuals attain a position of senior leadership in major corporations, grounded theory methodology was utilized—that is data was systematically gathered and analyzed and a general method of comparative analysis based upon principles of grounded-theory as expounded by Glaser and Strauss (1967) were utilized. As such, the study was not guided by one theoretical perspective or explicit reference to prior theory. Among the choices of phenomenological research methods, the life history interview was selected as the most appropriate one.

Life History Interviews as a Valid Methodology

Life history is always the history of a single life told from a particular vantagepoint (Hatch & Wisniewski, 1995). It is an attempt to explain, describe or reflect upon a life, to make meaning of it (Cole 1991). Life history makes possible the building of a bridge between the present and the past (Lea & West, 1995). The unstructured reflexive nature of the process enables both the participant and the researcher to consider how the events and experiences of the individual’s present and past have shaped his/her life. The data derived from life history interviews allows an analysis of the relationship between the individual’s biography, historical events, and the impact of broader social elements, such as class, race, and gender upon one’s choices (Goodson, 1992). As such it is a valid methodology for the purposes of this study.
Addition of a Personality Assessment Instrument

Although the study of business elites conducted by Jennings, Cox, and Cooper (1994) utilized questionnaires to assess personality traits, I decided against the use of them. The data of my study is to be analyzed in the context of the CEO’s lived experience. Therefore, the use of such instruments would be inappropriate as the profiles that result from completing questionnaires or personality assessment inventories are a current “point in time” view of the individual. As such, they offer no indication of the interplay of one’s personality and lived experience. Information about a CEO’s personality that is culled from the interview narratives will invariably be richer than that of any graphed profile. More importantly, the use of any testing in the process would have reduced the likelihood of the CEO’s willingness to participate in the study. In the corporate environment, assessment instruments are generally viewed as being highly intrusive. Their use would most likely have negatively affected the dynamic of our relationship, thereby reducing the quality and the trustworthiness of the interview data.

Prepatory Process

Bracketing

As suggested by Lincoln and Guba (1985), before preparing the interview schedule and engaging in the interview process, I engaged in a preparatory process of reflection to identify my own thoughts about how or why these people became CEOs. Having been in the business sector for over twenty-five years, it was important that I did not unwittingly bring any preconceived notions of how CEOs attain such positions and what personal characteristics they possess. Through this exercise, I endeavoured to articulate and set aside my biases and to be open to the surprises that would be encountered in the process.

As part of the preparation, while enrolled in a qualitative methods research course, I
prepared a paper on the interviewing process. I extensively reviewed the literature on life-history interviews as well as compile a list of guidelines on conducting effective interviews. In the process, I also compiled a list of indicators that signal to the interviewer that all is not going well. As part of this assignment, I prepared a draft of my interview schedule and solicited the professor's comments. The suggestions that she made were incorporated into the schedule and this schedule was used for my pilot study.

**Taping of Interviews**

As part of the aforementioned paper on the interview process, I reviewed the advantages and disadvantages of taping an interview. To obtain the most complete and accurate information, I decided that the interviews would be taped. Therefore, gaining the consent to tape the interview was a pre-requisite of a CEO's participation. Although tape recording interviews can be seen as intrusive, if precautions are taken, they need not be so (Gorden 1980). In accordance with Gorden's suggestions, I purchased a machine that was unobtrusive to the CEO, became familiar with the machine and used it in a forthright, matter-of-fact way. Similarly, I utilized Gorden's suggestion to make probe notes to jog my memory on points that need clarification or elaboration, rather than interrupt the participant's thought patterns. I also refrained from taking extensive notes during the interview, as this could have been a distraction to both the participant and me.

**Pilot Study**

The pilot study consisted of one interview with a male CEO. Although he would not qualify for inclusion in the study, I believed that he would be an excellent individual to test the effectiveness of the interview schedule and to obtain a frank assessment of my skills as an interviewer. Although time did not permit a complete assessment of the interview schedule, the questions he did answer elicited the type of information I was seeking. However, he did offer a suggestion to change the language of a question relating to early
childhood memories to make it more palatable. He commented on my skills as an interviewer and my use of non-verbal language that had encouraged him to continue to speak. During our time together, we also discussed strategies that I might use to gain access to the CEOs.

Maintaining an Audit Trail

Computer files were used to record the logistics of the study including the names of CEOs and their assistants, dates that CEOs were invited to participate, and the dates on which they either accepted or refused. The file also contained the dates when CEO profiles were forwarded and the date on which the CEO approved it for inclusions in the thesis.

Memoing

Throughout my research, I made notes in a computerized file in which I recorded connections that I saw in the data as I worked with it. I also noted hypotheses that were emerging and tentative metaphors. As well, strategies for analysis such as searches on keywords were noted for follow-up. Immediately, I noted any ideas for further analysis that came to mind. I knew that many of these would not likely be remembered, even an hour later.

Site Sample Selection

Marshall and Rossman (1989) suggest that “an ideal site is one where “(1) entry is possible; (2), there is a high probability that a rich mix of many of the processes, people, programs, interactions, and/or structures that may be part of the research question will be present; (3) the researcher can devise an appropriate role to maintain continuity of presence for as long as necessary; and (4) data quality and credibility of the study are reasonably assured by avoiding poor sample decisions” (p. 54).

At the outset of the study, I was somewhat apprehensive about my success in accessing the CEOs of major corporations. However, the participant of my pilot study as
well as some of my acquaintances who deal with senior people in corporations assured me that it was possible, although it could prove difficult. Characteristically, I aimed high and succeeded.

CEOs were invited to participate in the study via a letter of invitation which is included as Appendix A. This was accompanied by a letter of introduction (Appendix B) written by my thesis supervisor which I believed would facilitate access to this group by establishing my credibility as a researcher and vouching to the worthiness of their participation in the study. O'Donovan-Polten (1994) had used a similar approach in her successful study of eminent Canadian lawyers.

Through personal experience, I knew that the Executive Assistant (EA) controls access to the CEO. Rather than send an unsolicited invitation, I contacted the EA by telephone, introduced myself, and briefly described the purpose of my study. In all cases, I hand delivered the invitation and initially, I tried to establish a personal meeting with the EA to build rapport. O'Donovan-Polten (1994) attributed much of her success in accessing eminent lawyers to this approach. However, by the end of the fourth interview, I had found that though it was important to initially contact the EA to gain access, CEOs were participating in the study because they were genuinely interested in the topic. Therefore, I no longer made a concentrated effort to personally meet the EA when delivering the invitation, with no discernable effect by eliminating this step.

In total, sixteen invitations were offered over the course of the nine months I was involved in gathering the data. The financial sector proved to be the most difficult to access, with three CEOs declining participation. I attribute this failure to obtain their participation to the security procedures and policies of these institutions, where in most cases, I was unable to access the EA. One CEO in the private sector in a well-established industry declined participation. In the following week, a major restructuring of that organization was
announced. Two invitations were declined in the public sector. Again, one organization was going through a major restructuring and the other organization had a change in leadership the day after I delivered the invitation. Both the former CEO and the new CEO declined to participate due to other commitments. Another CEO in the public sector agreed to participate, he set out a number of conditions under which he would participate. Although I never talked with this individual, through conversations with his EA, I sensed he was uncomfortable with taping the interview and he would not commit to a second interview to review the accuracy of the preliminary profile. I decided not to pursue it any further. In the voluntary sector, none of the CEOs declined the invitation to participate. Therefore, access, continuity, and the avoidance of poor sample decisions met the standards set out by Marshall and Rossman (1989).

At the outset of the study, in discussion with my thesis committee, it was decided that I would interview nine CEOs. Three participants would be in the private sector and should include the CEO of a well-established industry within Canada, a CEO of a corporation involved in information technology, and a CEO of an organization operating in the financial sector. It was also decided that three of the participants should be CEOs of public corporations and three participants should be CEOs of organizations in the voluntary or non-profit sector. To determine if gender differences exist, one participant in each of the sectors was to be a woman. Since I was successful at meeting these criteria, the requirement of Marshall and Rossman (1989) that there be diversity within the sample was also met.

**Selection of CEOs**

In addressing the bounds of the study, review of the literature indicated that CEOs who are founders of their organization and CEOs who attained the position through familial succession should be excluded from the sample (Homaday & Aboud, 1971; Jennings, Cox,
& Cooper, 1994; Piercy & Forbes 1991). These CEOs have been found to differ in significant ways from those who attain the position through progression of the corporate hierarchy.

To be considered a major corporation, annual revenues had to exceed $30,000,000. Although a study was not located to support the choice of this figure, personal experience in corporate environments led to the selection of this figure as an appropriate cut-off point based on staff size of organizations with revenue bases under thirty million and the level of skills that would be required to manage the organization.

A number of sources including business directories and computerized databases were accessed to compile a list of possible participants. Being cognizant that the number of female CEOs would be relatively small, I concentrated on obtaining their participation first.

Organizations within the private sector were selected from the Financial Post Magazine: The Top 500 1997. Information regarding the background of the CEO was obtained from Who's Who in Canadian Business (1997) and the Canadian Business and Current Affairs (CBCA) 1997 database. Participants in the public sector were selected in a number of ways. Members of the thesis committee had suggested one participant. He was contacted and agreed to participate. A list of public sector organizations that met the selection criteria was compiled by searching the Compact d Canada (1997) database. The list contained no names of female CEOs and I noted that the database did not contain data on hospitals. The Ontario Hospital Association was contacted and I obtained a list of female CEOs and a participant was selected. The remaining participant in the public sector was selected from the list compiled from the search of the Compact d Disclosure database. Possible sites in the voluntary sector were compiled from data in the Canadian Book of Charities (1997) and participants from a variety of non-profit organizations were selected to participate.
Data Collection

The Interview

The interviews were a collaborative process in which the CEOs and I were engaged in a reconstruction of their life stories. It was a process of meaning-making grounded in the context of their personal and social histories. During the interview, my questions, prompts, comments, and requests for clarification encouraged them to share events and experiences that shaped their lives. Although I did have an interview schedule (Appendix C), I was not constrained by it. Rather, it functioned as a loose agenda and ensured that I was obtaining comparable information for analysis.

The First Interview

At the outset of the interview, the CEO was presented with the Interview Agreement Form (Appendix D). By reading this document, the CEO was reminded about the focus and the content of the interview. Sometimes, the CEO would initiate a brief conversation about my personal background or interest in this area before the interview got formally underway. Most times, the CEO made it quite clear that time was limited and the interview proceeded immediately upon receiving his or her consent to tape the interview.

The interview always proceeded with the first two questions of the interview schedule. By their nature, these questions were non-threatening and allowed for a building of rapport. At the outset, special attention was paid to the non-verbal aspects of the interview process. A few CEOs began the interview with arms crossed in front of them, but by the time we reached the third question, their body language indicated that rapport had been established. During the interviews, the CEOs remained engaged and a number of them made comments such as, "That's an interesting question." One CEO remarked, "You are asking a lot of questions that I haven't really thought about."

At the close of each interview, I discussed with the CEO the next steps of the
process and gave them a time frame in which they could expect the preliminary profile.

Initial Analysis and Compilation of the Preliminary Profiles

Consistent with the suggestion of Miles and Huberman (1994), transcription of the taped interview was begun on the day of the interview. The data was then formatted to be used with the Atlas-ti qualitative software program, one of many qualitative software packages now available for purchase. This program was selected for the ease and efficiency with which data can be coded and retrieved. The program is also noted for the tools that it provides to construct sophisticated data searches, data networks, and theory.

Data were coded, partially analyzed, and written up from a thematic perspective. During this process, connections that were seen in the data were memoed and questions that came to mind as I constructed the preliminary profiles were recorded for follow-up.

Verification of Profiles

After the preliminary profile was written, it was forwarded to the CEO with a request to arrange for a meeting to verify its accuracy and completeness, and to answer a few additional questions that had arisen during the preparation of the profile. The day before the second meeting, I reread the transcript and the profile and noted any additional questions that came to mind.

At the second meeting, the profile was reviewed and the questions I had formulated were discussed. Changes that the CEO wished to make were noted. About half of the CEOs added additional information they thought should be included in the profile and some small inaccuracies were noted. At this time, we also discussed what details the CEO wanted omitted or changed to protect his/her anonymity. The next steps of the process were discussed as well as the time frames in which they could expect to receive the final profile.
Final Profiles

Final profiles which included any changes and additional data from the second interview were compiled and forwarded to the CEOs. In the accompanying letter, the CEOs were again encouraged to report any inaccuracies or any additional information they felt had not been included. Three CEOs added further information at this point. Three noted small inaccuracies. Most made minor alterations for purposes of clarity or to protect their anonymity. All final profiles were approved by the CEO via telephone conversations or by returning a copy of the profile to me with the changes noted.

Text of the Profiles

Compiling the profiles was a collaborative process with the CEO. Due the nature of life history interviews, text relating to a particular theme can be scattered throughout the narratives. Since I had met with each CEO twice, in some instances the theme would appear in both interviews. Thus I have refrained from using "……" throughout the quotations for the sake of flow and appearance. Secondly, the use of verbatim quotes would have made the text unreadable. Readers would give up in frustration if they were required to wade through the false starts, incomplete sentences, "ums" and "ahs", and other repetitive phrases that peppered the narratives. And this would be unfortunate, for there is a richness in reading these narratives that analysis and interpretation cannot mine. Grammar was also an issue. Spoken language, especially spontaneous speech is typically different from written text. Again, readers have an expectation that it will be mechanically sound and that it will flow. As the purpose of the text was not to analyze its linguistic content but to strive for accuracy and clarity, judicious editing of the text was carried out to enhance its readability. Further, CEOs were also given editing privileges and two CEOs revised sections of the text to bring clarity to what had been said in the interview. In compiling the profiles, I also had to make use of my judgment in deleting repetitive
sentences. Therefore, discussions with the CEO about the accuracy of the profile were extremely important. Since the CEOs were actually quite fastidious about details in the profile, I believe the reader can be assured that what they read is an accurate description of their experiences and characteristics.

Data Analysis

Trustworthiness of the Data

When analyzing data that was obtained in an interview, a primary consideration is audience effect (Becker, 1958.) This is the degree that the participant’s responses are shaped by their expectations of who might read or hear about what they are disclosing. Thus respondents with significant power will disclose information keeping in mind what is relevant, what can be assumed to be existing knowledge, what should not be said, and what must be said to maintain their image.

It would be naïve to think that "audience effect" was not at play in the interview process. However, such effects would have been mitigated by the CEO's knowledge that their identity would not be made public and information regarding their participation would be kept confidential. I believe the quality of the data speaks to the openness with which these CEOs disclosed information about themselves. At the second interview, several of the CEOs remarked about the thoroughness of the profile. A few CEOs expressed surprise at the level of detail included in the profile. This can be taken as an indication that they were "relatively forthcoming," as one CEO put it. All CEOs were given the opportunity to take out of the profile any information they wished not to have published, an opportunity they were given again when the final profile was presented for their approval. In discussion with the CEOs, some data was changed or removed for reasons of confidentiality and the protection of their anonymity.
Secondly, the nature of the questions was designed to elicit concrete information, rather than opinions. Researchers (Holstein & Gubrium, 1995; Weiss, 1994) report that more reliable information and information that is easier to interpret results from asking participants about concrete incidents rather than about general states or about their opinions where they can shade responses to present a positive picture of the self. Richly detailed accounts of vividly remembered events are likely to be trustworthy (Weiss, 1994). An analysis of the data revealed that there are over forty anecdotal stories contained in the interviews in addition to historical and personal data.

Like any fieldworker, I have some personal qualities that I believe served me well in the research. One of these is an ability to build rapport quickly. In counselling sessions, it is not unusual for clients to share intimate details of their personal experience soon after meeting me. I'm not sure why and I'm not particularly interested in exploring it in any detail. I believe it has to do with the respect I show to others and a genuineness and sincerity that other people sense. Secondly, I am not particularly talkative. Silence has never bothered me. When in the presence of others, I tend to sit and listen and to ask questions. I don't mind appearing a bit "dense" if I don't understand something. I'm definitely not confrontational. On particularly sensitive issues, I'm not one to press. My pattern in this research was to follow up on these types of issues in the second interview, when the CEO had seen his/her profile and was aware of what would be published.

**Coding the Data**

After the writing of the final profiles was completed, detailed coding of the data was undertaken. By this point, I knew that a coding structure had to be formulated to handle the massive amount of data that had been collected. An initial list of codes was developed from the rationale for the interview questions, a listing of the codes that had been used when coding the data for the profiles, a scan of the profiles for recurring themes, as well as
hypotheses and hunches that had emerged as I had worked with the data to that point.

Code names and descriptions were entered into the software program. To assist in maintaining consistency, a one-page list of the codes and a printout of the code descriptions were kept at hand. These lists were updated with additional codes that were used. The list was extensively revised after coding each of the first two interviews with only about a dozen new codes being added after that point. The final list is included as Appendix E.

**Tactics for Meaning-Making**

As Mishler (1986) has pointed out, coded data have no “meaning” in themselves. Initial experimentation of the capability of the software program to produce what I was expecting led to the conclusion that it would be useful to have over-arching codes to facilitate analysis. Therefore, all data had one or more of the following codes attached to it: Childhood, Adolescence, Education, Career, and General.

As Glasser (1978) suggested, memos were written while coding and analyzing the data. In these were noted ideas about relationships in the data, questions that arose while I was engaged in coding, analyzing, and writing up the data. I also wrote memos as reminders to follow up on hunches and hypotheses for further analysis and theory building.

Helpful in the process of making sense of the data were a number of books (Boyatzis, 1998; Coffey & Atkinson, 1996; Miles & Huberman 1994; Wolcott, 1994). They all offered practical suggestions on the process of coding, analyzing, and interpreting data. As there were over forty stories in the data, a chapter in the volume of Coffey and Atkinson (1996) on the process of analyzing stories brought to my attention how rich these narratives could be in revealing information about a participant’s background, key characteristics, significant events, and turning points, to name just a few.

During the process of generating meaning, I used those analytical tactics espoused by Miles and Huberman (1994) that were appropriate for my research design. These
included noting patterns and themes, clustering, making metaphors, counting instances of occurrences in the data, making contrasts and comparisons, noting relations between variables, constructing matrixes, and building a logical chain of evidence to support conceptual/theoretical conclusions. Similarly, to test and confirm my findings, I looked for exceptions in the data, followed up on surprises, looked for negative evidence, and made if-then tests. To verify that the conclusions I drew from the data would have internal and external validity and reliability, I collected data across a full range of appropriate settings, ensured that comparative data was being collected, checked for meaningful parallelism across data sources as the data was being collected, made periodic coding audits to ensure consistency, identified discrepancies and checked them with participants, watched for emerging patterns between the profiles of the participants, and was vigilant that I was not projecting onto the data my biases and assumptions. When writing the final chapter of the study, I made explicit the limitations and generalizability of the results and carefully worded the conclusions so that they were accurately reported.

Ethics

The study was carried out in a manner consistent with the Ethical Guidelines set out by OISE/University of Toronto (Ontario Institute for Studies in Education, 1995) and the Ethical Principles in the Conduct of Research with Human Participants issued by the American Psychological Association (1982). Because the study involved human participants, approval by the OISE Ethical Review Committee was received before any part of the study involving a participant was initiated.

Role of Researcher Vs Counsellor

Before engaging in the process of collaborating with participants, I reflected on how the role of a researcher differs from that of a counsellor. As Glesne and Peshkin (1992) point out, "Self-reflections can produce pain where least expected, and interviewers may
suddenly find themselves face to face with a crying interviewee" (p. 123). I decided that should such a situation occur, I needed to handle it with the sensitivity of a counsellor but without taking on the role of a therapist. If necessary, I was prepared to provide the CEO with a list of people, organizations, or resources that they could access. In the course of the interviews, no such situations arose.

Reciprocity

No monetary remuneration was given to a CEO for his/her participation in the study. The letter of invitation delineated, that as part of the process, self-knowledge could be enhanced as they contributed to a deeper understanding of what factors lead to the attainment of positions of status and power. It also indicated that the research could be helpful to those who strive to attain positions of eminent leadership. All CEOs were promised a bound copy of the thesis.

Confidentiality and Anonymity

CEOs were fully informed of the purpose of the research and alerted to any known possible effects on their welfare. All CEOs read and signed the Interview Agreement Form before beginning the interview and were thereby informed that they were free to refrain from talking about any topic that they did not wish to discuss and that they could withdraw from the study at any time, if they should choose to do this. During the research, no conflicts arose over issues of dignity or the welfare of any of the participants. All of the CEOs were given opportunities to take out data they did not want published. Approval of the final profile was received from all the CEOs before it was included in the thesis and several further additions and minor changes that the CEO requested were made. All profiles to the participants were hand delivered in sealed envelopes and marked personal and confidential.

After each interview, a duplicate of the interview tape was made and the original was deposited in a safety-deposit box at a local bank. Backups of all computer files were made
on a regular basis and also kept in the safety-deposit box. The duplicate tapes and all documentation of the study were kept in a locked filing cabinet. A software program was purchased which made the computerized files invisible to any user—to access them requires a password, as do the backup diskettes. Discarded materials such as drafts of the CEO profiles were shredded. After the successful defense of the thesis, duplicate tapes and the computer files will be erased. The original tapes and copies of the computerized data files will remain in the safety deposit box until it is deemed appropriate to destroy them.
Chapter 4

Introduction

Scholars have long been studying personal narratives to better understand various aspects of the human experience. As Atkinson (1998) points out, "In the telling of a life story, we get a good sense of how and why the various parts of a life are connected and what gives the person meaning in life. There may be no better way to answer the question of how people get from where they began to where they are now in life than through their life stories" (p. 20).

The profiles included in this chapter are the result of a collaborative process that began as conversations between the CEOs and I within the context of life history interviews, a form of biographical work. In our discussions, we engaged in a process of meaning-making, in this instance, specifically related to their vocational pursuits. However, as one's vocational life is never lived in isolation, my questions, prompts, and requests for clarification encouraged them to illuminate in their narratives how their vocational pursuits fit into the larger mosaic of their lives. My task then was to take the narratives, integrate them into a whole, to make sense of them by pulling together the central elements of the conversations, and to shape them into a readable text. As I engaged in this process, I became aware of the importance of letting the voices of the CEOs speak for themselves. Again, as Atkinson (1998) points out, "If we want to know the unique experience and perspective of an individual, there is no better way to get this than in the person's own voice" (p. 5). Therefore, connecting narrative in the profiles has been kept to a minimum.

As detailed as these profiles are, the printed word does not and cannot capture the intensity of Cecille's personality; the friendliness of Paul and Keith; the graciousness of Sarah; the gentleness of John; the passion of Andrea; the playfulness of Dan; the
wistfulness of Allan and the underlying warmth of Ron. And, many of these characteristics are common to all of them. Although Paul outwardly spoke of his comfortableness about who he is, it is an attribute that is common to all of them, as is a genuineness that is felt when conversing with them. What was evident in the interviews and especially noticeable when I transcribed the tapes was the amount of laughter that permeated many of the conversations.

So meet the CEOs: Paul, Cecille, and Allan lead major corporations in the private sector; Ron, Andrea, and Dan provide leadership to organizations in the public sector; John, Sarah, and Keith are CEOs of major charitable organizations in the voluntary sector. For reasons of confidentiality and to protect the anonymity of the CEOs, all names have been changed. All other identifying information has been changed or deliberately made vague to the satisfaction of the CEOs.
Paul

The power of what I am is in my accomplishments and the relationships I have established.

General Background

Now in his early fifties, Paul is the CEO of the Canadian division of a large international financial organization. After graduating from university with a bachelor's degree, he worked for a short time in a sales-type role for a large company in the United States. Returning to Canada, Paul obtained employment as a financial analyst with a large financial organization. Two years later, he was promoted to Assistant Investment Manager. A decision to move from investments into insurance resulted in his appointment to a position in the Corporate Planning Department where he had exposure to the insurance side of the business. Within the year, Paul was appointed a Branch Manager. His success in this role led to the position of a Regional Manager, a role he held for five years before returning to Head Office as a Vice-President. Five years later, he was appointed an Executive Vice President with his subsequent appointment to President and Chief Executive Officer occurring two years later.

Childhood Environment

Paul described himself as a normal kid who grew up with his younger sister in a small Ontario town: "I grew up with lots of friends and played lots of sports. Two fairly normal parents. I don't ever recall a lot of family conflict. We didn't have a history of the problems other families seemed to have. I don't ever remember my parents drinking except the odd time at the cottage on the weekends. There were not many family arguments that I can recall either. So, it was a reasonably healthy environment. We certainly weren't wealthy. I think both my parents were always striving to improve their situation. Perhaps,
that's why my mother decided to set up a store and was actually quite successful. It was a normal, happy upbringing."

Influence of Father

"My father grew up during the depression years. He was raised along with his three brothers and two sisters by his mother, after his father left. It was a subject that wasn't talked about too much, but my grandmother raised the six children while living in a very small house, in very modest surroundings. All of the kids kind of pitched in and helped out. Interestingly enough, all six were, what I would call for lack of a better word, very classy people. They were all successful, although with one exception, none of them became particularly wealthy. They didn't run up corporate ladders and things like that. But they seemed to do well and always had the respect of people around them.

"My father was extremely well liked and a bit of a personality. Although he wasn't a comedian per se, he did have a natural kind of twinkle in his eye and people liked being around him. Back in those days, they used to try all kinds of different things so he worked in the lumber business for a time, was in the travel business a bit and eventually bought a number of taxicabs in a nearby city. At one time, he owned a gas station as well as the taxicabs. And then in the years before his death, while continuing to run his taxi business, he went to work as the Vice-president of Marketing and Sales for an uncle of mine.

"I always thought his time was his own and he was able to pick and choose what he wanted to do. He'd often drive me to school in the morning. It seemed to me that he was someone who liked to manage his own time and wanted to have some flexibility. I think that was a bit of his nature. He was a very good athlete in his younger years and he always seemed to be on the go. However, he developed heart disease and unfortunately he died quite young, before he reached the age of fifty.

"I respected him. I don't recall, even as a little kid, getting a spanking or anything
like that. When my father was stern, I knew that he was serious. So if I stepped out of line, a serious conversation was more than enough. Our relationship wasn't one that I would call close if you based it on time because of the various business ventures he pursued and the strange hours he kept. But it was a good relationship. I do recall that even though he was fairly busy, he coached one of the hockey teams that I played on. I remember it as being good fun-time that we spent together. He used to enjoy fishing and hunting and we would do that kind of thing together too.

"However, it wasn't the kind of relationship where I would have sought him out for advice on a lot of things. But, he seemed to have a good intuitive sense of when to come and sit with me and talk about issues. I can't remember any long father-son conversations except one. I got the sense from the discussion that he was quite ill and there was probably going to be some implications for me, that I needed to 'step into his shoes' as the old movie line goes.

"When he died, all of a sudden a big part of my life was not around. I realized sooner than would have been the case that I was on my own. My normal adolescent development suddenly changed and I realized that life was not going to be kind of normal and steady—finish high school, go to university and get a job. Financial circumstances were a little more stretched than we would have liked and very quickly I assumed adulthood and took ownership of my own affairs."

Influence of Mother

Unlike his relationship with his father, Paul was very close to his mother: "Because my father travelled a lot, I've always been very close to my mother. She was the steady force at home. She was fun-loving and a real go-getter. Our relationship was always very good. I think she found me pretty easy to manage as a young guy. I didn't really get into a lot of stuff and she gave me a lot of freedom. She's a sharp woman and perhaps, in a
different generation, she would have been quite successful in big business. Everything she took on, she seemed to do well. I guess I am a combination of the qualities of both of them."

Childhood Accomplishments

Paul excelled at athletics and a significant number of his childhood accomplishments relate to this area: "If they ever had a category for the person who played the most sports at the highest level, I'd probably win it. I didn't focus on any one activity. I never said 'I want to be a professional baseball player' and then, go do it. I just enjoyed playing sports and the experience of playing on a team. I always made the teams. I played reasonably well and I was pretty versatile. That is, perhaps, part of my personality—being able to be flexible and yet always quite stable, never way up there or down there."

"When I look back, I realize that perhaps the relationships I developed when I was growing up are also accomplishments. I made a lot of friends in the community and in the schools. Just a month ago, my oldest friend came in to see me. He and I went to junior kindergarten together and though he's now retired from the civil service and living in Ottawa, we still keep in touch. Several of the guys I grew up with are still friends of mine. We all have been incredibly successful. I think at one point in time, someone was going to study the group of us to find out why these guys, who all shared a common friendship, yet took totally different paths, have all been successful."

Education

When Paul went to school, he attended the elementary and high school in the small community where he grew up. He described himself as not being academically inclined: "I was a normal kid who went to school, did the minimum to get by, played a lot sports and had a lot of friends. And I guess I was a fairly normal adolescent who got interested in the young ladies in high school."
"It was in my last year of high school, as I was preparing to head off to university with my friends, that my father died. Since my mother didn't have the money for the tuition, I had to work for three years. Most of that time I worked as an expediter in a manufacturing plant. Considering it was factory work, it was quite a good job. There were a lot of nice people that worked in that plant. I remember while working there I used to think how these people had already fallen into a pattern for their lives. This was their job and they looked to the company benefits and a marginal annual increase in salary that was negotiated by the bargaining units as their way of securing a better way of life. Now I didn't try to put myself above anybody. I was part of the group that knew they would always be there. But, I always felt different. I knew that I would never be trapped. I never felt that all of sudden I'm getting a pay cheque and isn't this great. While I was there, I recognized that it wasn't for any other purpose than securing some financial resources.

"To earn some money, I also worked in my uncle's business for a time. I did odd jobs for him and he would have liked me to take over the business but I declined. I always felt that I would be successful at something. I wasn't sure what the hell it was going to be, but the business he was in wasn't the type of activity in which I wanted to immerse myself. It was not something that stirred my fire. I just didn't have any passion for it. It would have been convenient but it just wasn't my line of work."

To fund his education, Paul also pursued a couple of athletic scholarships and received one from a large university in the United States: "Since some of my buddies were on the team there, I decided to visit the school and chat with them. What I learned made me a bit nervous about pursuing a sporting career at the same time as an academic career. By that time, I had matured enough to realize that what I really wanted to do was get an education. I wasn't sure that I would be able to succeed at both and so I declined the scholarship. However, a counsellor from my high school, who had kept in touch with me,
suggested a small school in Indiana. He knew a couple of students who had attended there and he thought that it would be just the right environment for me. Convinced that it would be a much better fit than an institution with thirty thousand people, I decided to go there."

When Paul completed his undergraduate degree, there was a recession in the United States and he wasn't sure what he wanted to do: "I thought about pursuing an MBA, although I had concerns about the debt load I had already accumulated. But after considering a number of options, I decided to apply to a number of universities and was successful in securing a scholarship to a couple of them. Maybe this was my own mistake but the scholarships I had applied for were based on grade point average. In other words, the higher the grade point average, the more money I got. Interestingly enough, what happened that year with the recession and the inability of a lot of folks to get jobs, a number of students decided to go to graduate school and as those with higher grade point averages applied for scholarships, I got knocked back. By the time I was ready to go, my number didn't work. So, I decided I had to go to work and perhaps pursue graduate studies at a later stage. However, things started to happen and kept happening so that I never did pursue the degree."

Significance of Education

Paul believes that without his undergraduate degree, it is unlikely he would be at the level he is today: "It would probably have been the minimum to nudge your way into business at that time. Today, I'm sure you would need an MBA. But at that time, the degree was important but perhaps not critical for most entry-level jobs. If you got in the door, then proved yourself, you had a pretty good shot at things.

"And, although there were a lot of us who were decent, you really could stand out. I think my college resume looked pretty damn good. I had been involved as a student assistant. I had taken leadership roles both in my fraternity and in the university. I had
been in charge of all the school's business publications including the newspaper and the yearbook. In my last three years, I had made the Dean's List. I had lettered on a sport at the varsity level and won a number of scholarships that were kind of nice because they weren't awarded for just my academic performance but they acknowledged that I was also a well-rounded person. So, for a certain type of role in an organization, I think I was reasonably attractive and I always thought I could sell myself.

"However, I wanted to work in investments and getting a job with just a high school education would not have been an option. Without the degree, no one would have looked at me. The degree did what I expected it to do. It opened the doors."

**Career Aspirations**

Like most CEOs in the study, Paul never aspired to become one: "I don't think I ever had becoming a CEO as one of my personal objectives. I've always been guided by the desire to do the things I like to do. And I'm inherently competitive enough, so that whatever I would have pursued, I would have kept at it to get better. If I hadn't liked the progress I was making, then I would have shifted and done something else."

It is not surprising that Paul chose a career in business: "Not only were my father and uncle successful entrepreneurs, almost everyone in the family was somewhat entrepreneurial. So, frequently around the family table, different business issues would be discussed. And one of those was the stock market. In fact, my uncle became quite wealthy because he made a significant amount of money in the market. He used to talk about that a lot. It seemed to me to be an easy way to make money. By the time I graduated from university, I had had a variety of experiences and I was reasonably mature in terms of my personal vision. It wasn't set as high as what I would subsequently achieve but there was an internal burning to pursue a career of some kind and be somewhat successful at it."
Significant Decisions

Upon graduation, Paul pursued positions with several banks in Chicago. However, being unsuccessful in obtaining employment, he returned to Canada. A visit to a colleague who lived near Buffalo resulted in an employment offer with a large American organization: "I worked for two years in a sales-type role. The company moved to New York and since my student visa was running out, my employment was conditional on being granted a green card. For some reason, I didn't feel I was likely to be granted one and I wasn't convinced that I wanted to live in the U.S. I used to come home on weekends and my brother-in-law was doing his MBA and knew that the firm in which he had been employed during the summer was going to be hiring in their investment department. I had always been interested in finance and investments and I thought I would like to give it a try. I wasn't sure I wanted to be a stock salesman but I realized that I needed to get into the field somehow. So, I called up and secured an interview.

"I vividly remember how nervous I was going into the interview, thinking that within two weeks, I would have to make decisions about investments. My brother-in-law had coached me on what they were likely to ask and I recall reviewing the formulas and ratios that I thought would be absolutely critical. I did well and I was offered the position. However, the salary was $5200 a year and I had just made $20,000 in the previous year. It was a cut of rather significant proportions. But, I thought it would be a great starting point because the job was an investment analyst's role where I would go in and learn the guts of the business. I had gotten a sense from the manager for whom I would be working that I would be given time to learn.

"So while in that position, I learned a lot about how companies work and the inner workings of the stock markets, the economy, the bond market and so forth. It was an excellent foundation. For a young person pursuing a business career in this field, it was
absolutely critical."

Paul was quickly promoted to the position of Assistant Investment Manager and because of his phenomenal success, he was receiving offers to join other firms. People were also telling him that he would be terrific as a salesperson selling to institutional clients: "These guys made a lot of money. I knew I had the type of personality that could do well in that kind of role but I was smart enough to think beyond the immediate bucks. I understood the business and the last thing I wanted to be was a forty-five year old salesman dealing with thirty-one year old Harvard MBAs wondering what the hell am I doing here."

"I am the type of person who likes to build on a solid foundation and I wanted to build my career on substantive accomplishments and work activities. I knew from the experience of working in a sales-type role in my first job that I wouldn't like it. I remember thinking after I had been in that job for a while and I was doing very well, 'Oh my God, what a way to spend your life. You are only as good as last month. You hit your quota, you exceed your quota, and you get letters from everyone congratulating you on your wonderful job. And, boom! Now it's August and away you go again.' And I couldn't stand that kind of environment, so I decided not to accept the offers and to stay with the organization as an investment manager."

After being with the organization for a few years, Paul was asked to attend the company's assessment centre. His participation in this program led to the most difficult but significant decision of his career: "These assessment centres were like boot camp. The company would pick people and bring them to international corporate headquarters and then knock you down, drag you out, find out what you are all about, and see whether you could cut the mustard. So four years after joining the company, I went through that experience. It was brutal! But I performed very well. So well, that a few months later, one of the senior executives asked me whether I would consider moving out of the investment
area and into insurance.

"It was perhaps, the most difficult decision I ever made because I loved the investment side of the business. I knew, at the very minimum, if I decided to stay where I was, I would become the Vice-President of Investments and it would have been quite lucrative to remain there. And, although the guy in that position was going to be around for a while, I knew I was quite mobile and could get another job. Furthermore, I wasn't particularly attracted to the insurance side of the business and I was not excited about the position they were offering. I knew I wanted to work with something beyond dollars in and dollars out, that I wanted to run something. I just wasn't sure that I wanted this type of work. I knew that it was a lousy job, that I didn't want to do it.

"At the same time, I was again getting calls from headhunters and friends who were offering me jobs paying well above what I would be earning in this position. I'd probably be making about $30,000 and I remember being offered $100,000 by one of the firms. I recall sitting on the veranda, having a glass of wine with my wife, and saying to her, 'You know, am I crazy here?' And her response was, 'Well, what is it you really want to do?' And I said, 'I really want to build something. I want to work with people. I want to run something that proves whether I'm good at that kind of thing. This kind of job will give me a shot. So why don't we just give it some time? If it doesn't work within a two year window, I can go back into investments.'

"So I made the decision to take a position as the Manager of Corporate Planning, a decision that mystified a lot of my friends and colleagues. However, I had an agreement with the company that I wasn't going to be stuck in that role for an extended time, that it would be viewed as a learning experience, an opportunity to get a sense of the insurance business, and give me a good idea in terms of whether or not I was prepared to make a commitment to it. It wasn't that they said I was welcome to go back to investments, but they
did say, 'Here's a job. We won't keep you in it too long.' That was probably the best vehicle they had at that time for taking people who had no experience in insurance and immersing them in that side of the business."

**Significant Accomplishment**

Within a year of making the decision to take the position in Corporate Planning, Paul was appointed to the role of a Branch Manager. While in that position, he made his most significant contribution to the company up to that time, one which was to earmark him as a possible candidate to the position of CEO: "I did very well in that position. I raised the performance of the branch to one of the best in the company. It was the first time I had all the levers so to speak. It was like being the CEO of a small company. I was in charge of everything. It was also the first opportunity to begin to change the culture of the organization from the hierarchical model that was in place to one of relationship building. I have learned a lot since then but essentially I don't operate any differently today and I hold the same values. People tell me I haven't changed. I believe in the power of people and I like to create an environment that empowers people and where they take ownership for what is being done."

**Personal Characteristics**

**Interests and Hobbies**

Paul comes from a family that was known in the community for their athletic prowess. Not only was his father a good athlete but people in the community would often tell him what outstanding athletes his grandfather and his brothers were. In elementary and high school, Paul enjoyed playing hockey, baseball and football—sports that were typically played in the small community in which he lived. He also participated in track events and his speed surprised most people because of his small stature.
"Although my skills in hockey were at a level high enough to win a scholarship to a well-regarded university in the states, I wasn't a potential NHL star. I would say I was good at a lot of sports and I do think competitive sports had an influence on me. I found being part of a team and trying to do things reasonably well to be rewarding experiences. Today I play squash, tennis and golf, a sport I started playing when I was fairly young. I love the competitiveness of those games and anything that requires hand-eye coordination, I am able to pick up fairly quickly."

On the other hand, Paul doesn't have a great deal of interest in the arts: "I come from a family that is not musically oriented, although at a party, they do like to dance. I used to get kidded every once in a while about my taste in music. Some people found it strange that I didn't have any musical interests. I was never one of those people who would listen to records at home and things like that.

"I did like to read, although I was never a voracious reader. Again, you wouldn't find me home on a Saturday afternoon reading a novel when I could be down at the park playing football. However, I did enjoy reading Sherlock Holmes and different kinds of mystery and adventure books at bedtime. While at university, in addition to course readings, I read a number of business magazines. I was one of those guys who regularly read Forbes, Business Week and the Wall Street Journal. I really enjoyed the whole area of business and understanding it, particularly, finance and banking."

Self-Confidence

Paul's experience at university reinforced his belief that he could succeed if he put forth the effort: "It wasn't Harvard but it was a good experience for me. It confirmed that when I put my mind to something and get going, it tends to be quite rewarding. So that was good. The first year I found really difficult. I was very concerned about my ability to handle the workload. Since I had been out of school for three years and I hadn't put much effort
into studying in either elementary or high school, I wasn't sure of what I was capable of accomplishing.

"The workload was a fairly major shock to the system and I worked very hard. I remember many Friday and Saturday nights, when others were out drinking beer and having a good time, I was studying. Like a lot of things in my life, I discovered that once I was there, the issues around performance that looked pretty challenging from the outside weren't as formidable as they seemed. There was a steady advancement in my performance and confidence levels and I ended up doing quite well, particularly after the first year when I was perhaps over my jitters.

"Similarly, when I began working for this organization, I thought I just would like to be successful, be recognized for good work, and if that moved me up to some senior level, then that would be fine. As I got more involved and had the exposure that you get at senior levels, I learned quickly that there's really no magic around that table. I found that I knew as much, if not a lot more, than these other guys did. The more exposure I got, the more I realized, 'Wait a minute, I always thought they were up there, but they're not.' So, as I increasingly became more and more confident of my leadership style and was given the opportunities, I became pretty confident I could run a company."

Love of Competition

"I am extremely competitive, just ask any of my colleagues. And I like to think that I always play fairly. In fact, when playing tennis, if there is question of whether the ball is in or out, I would work it against me. But, I always play to win. It's the same in business. I like the score card of business and the success that comes with increased financial returns to the shareholders. I enjoy the discipline of the free market. It doesn't mean that everyday you are out there hunting for your meat but it is the survival of the fittest. And you better be good."
Desire for Recognition

"I don't want to sound as if I was a star athlete but I was always a pretty strong player because playing sports just came naturally for me. People would see my passion, my competitiveness, the fact that I played well, and I always felt pretty good about that. When I was ten or twelve, I remember being the assistant captain and how proud I was wearing the big 'A'. It was my first band of recognition. It was kind of fun. And then I was captain of the team and wearing that 'C' was quite gratifying.

"Now perhaps, the things I find most rewarding are the messages I get from staff and people who say things about my behaviours or what I've said or done that may have helped them or meant a lot to them. I'm very proud of the fact that I have as equal a number of women executives as I do men, which is unique to the Canadian industry. When I finally decide to leave and as I reflect upon my career, I think the most positive elements of it will be the power of what was created through people, how important that has been, and how exciting it was to see pretty normal people do great things.

"I also enjoy the material rewards that come with success, but it's not a big deal whether I get them or not. I come from that middle class mentality that says, gee Christmas is here. Isn't it nice that I was able to get that. But if I didn't get it, it wasn't a big deal. Since I've been with this organization, I don't ever recall going in and demanding more money. I always took a longer term view that if I liked what I was doing and enjoyed it and had selected a solid organization in which to work, I would see my lot in life getting somewhat better. Sure, I enjoy the rewards of success. I enjoy the recognition. It's good for the ego."

Maximizing Opportunities

Paul believes that part of his success is due to positioning himself to take advantage of opportunities: "When I graduated from university, it was never a question of whether you
would get a job, it was which one are you going to take. But then you had to manage your affairs to position yourself for higher things, whether you got them or not. As I look back to the times when there were options before me to work elsewhere, I remember assessing them against my current positioning. I was working for what I considered a prime company. I liked the values. I saw within the organizational framework the opportunity to go to the next level, to be given the added responsibilities and the opportunity to demonstrate what I could do. So, why would I risk it.

"The good thing about business is that it comes down to your performance. You can be the nicest person in the world and have a lot of good ideas but if you don't deliver, it doesn't work for anybody. I haven't given it years and years of thought, but once I put myself on that platform of starting to move forward and seeing different responsibilities and becoming more involved in the management process, I opened up opportunities for myself. I think the pivotal time was when I went into Corporate Planning. Then I was neither fish nor fowl. I was no longer an investment person and yet I wasn't an insurance person. So in some ways, it was a high risk time, both in terms of knowing whether I would like it on that side of the business and whether I would be any good at it. But once I began to get the sense beyond the corporate planning role that yes, I thought this business was pretty exciting, that it wasn't what it seemed to be from the outside and yeah, I think I can be pretty good at it, I began building that solid foundation on the insurance side. Then, after a couple of years, my ability to manage my personal development wasn't as dependent on the company doing things for me. All of a sudden, I was acknowledged as a person with a skill set and a capability that was marketable. So, everybody needs that point. But if someone had come along at that point and said, 'I know that the previous guys liked you but I don't like you. You're not going anywhere.' Well then of course I would have had to start to make some alternatives happen."
Personal Values

Respect for people, personal integrity, trying to do what's right and trying to deliver on it are core values that Paul holds, values that he has tried to incorporate into his leadership style and were evident even as a young boy: "That sense of fairness is a great quality that I'm not sure where I got it from. I do remember as a young boy getting punched in the nose defending a young kid who had immigrated to Canada after World War II. He was among a number of families that came from Germany and other Eastern European countries and settled into small communities. I remember telling some of the other kids that he was a good guy. Just because he had a funny name and spoke with a little bit of an accent didn't mean you treat him with contempt. How I had that sense of value, I'll never know. But I got a good shot to the nose trying to include him in my group of friends."

Thinking/Working Smart

When Paul received the results of the feedback of the company's 360-degree program, he learned that not only had he scored higher on almost everything than the other senior executives but the results indicated that he was a balanced individual: "Often CEOs are way up on this thing and way down on this one. I don't know whether this is good or bad. It's just I'm a fairly balanced person. I am one of those people who see the world with wide vision. I pick up on things. I see little things. I see big things. I don't miss anything. I've always had a good intuitive sense for business and business issues as well as an understanding of what makes the world tick. Even as a young person, I always felt that I had a pretty good sense of the process around making things happen, getting organized, getting people involved, taking ownership for one's work and things like that. So as I went through my business career, I was able to assess everything I was doing from the perspective of, 'Is this something that's good and I'll add it to my repertoire, put another arrow in the quiver so to speak' or 'Is this bad and its not a behaviour I ever want to exhibit.'
As I went through, I kept putting more arrows in my quiver and ensured that the behaviours I didn't like were things that I was particularly sensitive to. I think that is perhaps part of the reason why I am a CEO.

**View of Leadership**

"I think what I like most about leadership is the building of the relationships with the people who work in the company. I take the view that great companies aren't just the product of someone creating a great culture and a value system that allows people to work and enjoy themselves and have a good time. It's that the people who work in those companies are extremely disciplined and focussed on what has to be accomplished. There is a tremendous amount that can be done through people by creating a sense of teamwork and giving them a vision of what can be achieved. People get enthusiastic and excited about coming to work when they aren't afraid to put their ideas on the table and they feel free to challenge the status quo and decisions that are being made. Perhaps that will be the legacy that I leave this organization. And it's been my greatest pleasure in terms of seeing that transformation take place within this organization. There have been a lot of rewarding things that have happened during my tenure using this approach. It's never where you would like it to be. It's like any team. You are always going to have some challenges and some will resist. But its moved considerably. It's quite a positive environment. And that kind of foundation has allowed us to go on and make a number of strategic decisions that have been quite successful."

**Self-Esteem**

Paul described himself as the type of person whom it takes time to get to know and understand: "The power of what I am is in my accomplishments and the relationships I have established. For example, I never would go to a meeting and try to grandstand. I'm not a grandstander. My ego doesn't need to stand up there and do a Fred Astaire in front of
a bunch of CEOs. Over a period of time, when I feel comfortable or want to make my point, I start to make it. I think that's why staying with an organization is important for someone like me. Over time, I've demonstrated who I am and what I am about. In the international head office, they acknowledge that now. Not that every time I say something the world sits up and listens, but I have earned that point.

"And my ego can take someone else having the spotlight. That's why I like an environment that empowers people, where they're getting the rewards for what they do. But they know that I was the guy who created the environment and that proves to be quite positive. My personality has always been rooted in who I am and I'm quite comfortable with who I am. I actually like myself. I'm certainly far from perfect and I have my foibles but I'm confident in who I am. I'm not a personality that really antagonizes people. They know I'm a very strong personality in terms of my own beliefs and what I do. I'll stand up to anybody. They saw that early on.

"For example, when I was the Manager of Corporate Planning, I was required to report on all the monthly variances against plan and the results of the previous year, which was really a bizarre situation. At that time, the CEO was somewhat of an autocrat. At one particular meeting I was being asked a lot of questions about the company's performance on the East Coast—why are the expenses up and on and on and on. I remember being fairly well prepared but I was getting fed up with this and I lost it. I don't know why. I'm not one to lose my temper but I said, 'This is absolutely crazy. Now, I can try to get the answer for you if I haven't got it and that's fine. And I will do that, if that's what you really want me to do. But you know, this operation does not report to me, it reports to this man right here. Why don't you ask him what's going on there? He's responsible. Why don't you get the people who are responsible for these operations telling you what's going on, rather than me. That would seem to make a lot more sense to me.' Most of the executives at that time were
afraid to say anything to this guy. But here I was, a brash young guy, who had enough confidence to make this observation and to challenge him. I think what I said shocked a lot of them.”

Handling Disappointment, Failure and Stress

When faced with personal failures or disappointments, Paul is “pretty hard on himself”: “Again, it’s part of my personality. It sounds terribly arrogant to say but I’m not sure I’ve had too many personal failures but I do make my share of mistakes. I try to create an environment where people can talk to me if I am off track on something so that I’m not blindsided about what I may have done. But when I make mistakes, I kick myself in the butt and I try to learn from them. It sounds trite to say that but I’m a very practical, common sense type of person so I don’t wallow in it and beat myself up to the point where I’m walking around with my head down.

"I’m also the type of person who will sometimes show it in their face when they are under a lot of pressure. And my colleagues know me so well that they’ll wander down and say, ‘Is everything OK?’ And we’ll laugh and joke. I use humour a lot with my people. I like to create an environment where we can laugh at our foolishness and mistakes. I laugh at myself a lot more these days, then carry on and move ahead."

Balancing Of Roles

Throughout his career, Paul has found it “tough” to balance his workload and his personal life: “I really am a family guy so my family has been very very important to me and always will be. I used to spend a lot a time with my family when they were young, to the exclusion of other things. Consequently, I didn’t have time for friends. I worked very hard at the balance because I wanted to be part of my family. I didn’t want to exclude them and pursue my career at the expense of everything else.

"And I’ve never really been motivated by money. Sure, I wanted a decent life style
but I wasn't driven to the extent that I wanted all kinds of material things. And so I wasn't burning with ambition to make a million dollars a year so I could have this or that. I'm fortunate that I married a good woman who is a lot like me. So, we've always had a good time and our life is actually pretty damn normal. And it's surprisingly balanced."

One of the ways that Paul has achieved this balance is to "sometimes be very selfish" with his time: "I've been a runner for years and my secretary knows when I put an X in my calendar that's when I am going out for a run. And I just grab that time. I don't care if it's eleven o'clock or it's five at night or whatever. She just knows to work around it. And I did the same with my family. If I was to be home at four o'clock on a Friday because we're heading out somewhere, I was there. With this kind of job, you could be here till ten o'clock every night if you want to be. If you want to be a workaholic, it will give you the capacity to do so. Again, I enjoy my family so I avoid working till all hours. I'm selfish, I'm disciplined, very disciplined, and I'm organized and that permits me the personal time."

"One of the nicest things that I have ever received was a letter from one of my neighbours who was a retired senior executive. It read, 'I know you put in late hours as I have often seen your light on late at night and I know you are probably working. But I have never seen anyone who has been able to spend as much time with his children and maintain a senior executive level position as you. You know, its kind of special when I drive by your house and you're out there playing with your children.'

"I've never really taken the position that I'm now a CEO and I'm up here, that this is entirely my life and what I'm all about. If someone came in here tomorrow and said, "We would like you to move on," I would say, "Well, ok." I love this company. I've dedicated my working career to it. I love the people, but you know, I could survive very well, thank you very much. And others, perhaps, may have a hard time because they built their whole life on their career. Their job becomes who they are. I am who I am. I love this job and what I
do but I can go do something else if I had to. You work too hard and too long to be doing work that you don't enjoy or doing work in an environment or for a company that is not right for you. I don't care what it is or how much money there is, it's not worth it. You're here for a very short time."

**Career Development**

**Mentors**

Paul has been fortunate to have had a couple of mentors within the corporation who were particularly helpful: "I believe that one of the finest mentors was the Executive Vice-President who convinced me to make the shift out of investments into the insurance side of the business. People used to call him the blue-eyed, silver fox. He scared everyone to death but me. They used to say he could stare down the devil. But he was my first, and perhaps, my finest mentor. I think he liked me as a person and we hit it off. I used to stand up to him where others would quiver and shake.

"I remember one particular occasion. He had asked me to organize a conference on company communications and the feedback from the managers was quite negative. The president was enraged by it and typical of the time, instead of acknowledging that maybe we've got a problem, a witch-hunt was instigated. So this executive vice-president wheeled me into his office and said, 'You organized this conference.' And I said, 'Wait a minute here. First off, listen to what's being said. Your management and staff are not happy and there is an element of communication going on here. The guy in the corner office is scaring everybody, so no wonder it's an issue. And you've got a witch-hunt going on! Give me a break. This isn't my fault. You asked me to get the people together. I did that. It's your fault.' And I walked out of his office.

"Years later, his secretary told me that he came out of his office laughing and said,
"You know that guy, Paul Terrance, he's a good guy. He's the only one who would stand up to me.' And she said, 'You know, he really liked you. You were the only one to stand up to him. The rest of them all said 'Yea, we're sorry, we shouldn't have said what we did.'"

A second mentor, whom Paul believes was influential in his success, was a former Branch Manager: "Another mentor was a chap who had been a Branch Manager in Quebec and became the head of marketing before being appointed Executive President and then President. He became a mentor and a pretty good friend when I was running a region. Perhaps he's the reason why I am the CEO. It was he who appointed me to the position of Vice-President Finance and earmarked me as a possible successor to the position of President."

**Feelings upon Appointment**

Paul is not sure that he had any particular reactive reaction on the day he was appointed: "I had been earmarked for the job, so perhaps, I had in my own mind, begun the assimilation of some of the responsibilities. I think that was perhaps my sense of excitement around what I was about to do. I was reasonably confident. It was a good operation here and I felt pretty comfortable about what I was going to do. Although, when I first took on the role, I had to come to grips with the magnitude of the activity. If you are not disciplined, it can actually overwhelm you. I tried to do everything in the beginning and that became a bit stressful. And any CEO will tell you there are situations that are beyond your personal control and that was a bit tiring. But I've become focussed on the key issues that need to be addressed. I've become very disciplined at how I manage the administration of the office. I certainly involve many of my colleagues so that the load is not entirely mine. My colleagues would probably tell you that the transformation has been rather remarkable. And throughout, the balance with the family has always been a solid foundation. Even the fact that over this long period of time, I've continued to have a regimen of fitness has helped
and it can't be underestimated how important that has been."

Reflecting Back

"If I had it to do over again, with the wisdom of my years, I would approach high school with a whole different perspective. I'd have crafted my plan to pursue higher education with the possibility of getting into Harvard or a similar type school. Although I have taken a number of different courses over the years and had the opportunity to participate in company sponsored programs at Templeton College at Oxford, I do have a slight regret of not having pursued my MBA degree. I would have quite enjoyed it. During my time at university, I made that transformation from viewing education as a necessary evil as a young person to seeing how much fun it is when you are really studying something you enjoy. There are a few other things I would have done differently. However, I am a product of the baby-boom generation. I was fortunate enough that the mistakes that I made as a young person I was able to overcome with my inherent ambition and the view that I could become successful by working my way through things in one way or the other."

Future Aspirations

Just recently, Paul has been appointed Chief Operating Officer for the Americas, which includes the United States, South America and the Caribbean. As he has in the past, before accepting the position, Paul carefully weighed the impact of these added responsibilities upon his family: "My family was an important part of the decision. I'd been asked several times before to go overseas to take broader responsibilities but I didn't think it would have been a good decision for my family. I wanted my children to grow up in a kind of normal household and finish high school before I pursued a personal agenda. So, taking this promotion was conditional on the agreement that if I didn't want to move to the states, I could work around it. Hence, I spend a lot of time on airplanes. If I was driven purely from a financial perspective, I certainly would have relocated to the states with its lower tax rates
et cetera.

In terms of the future, Paul is especially excited about the challenge of developing business in Latin America: "This appointment is good for me because I'm at that stage where I probably need to do something else. I've been intensely loyal to this organization. Perhaps, some would say, foolishly so. I've had a lot of overtures to do other things but I have always felt it would be difficult for me to ever compete against the people here because I'm too attached to them.

"I've often thought I would like to take who I am, what I've learned, and what I've accomplished to a whole new industry. I have changed the culture a lot and it's been very rewarding. So to go and do that in a whole new world, perhaps in manufacturing or in oil and gas, might be a possibility. But it's not a big deal if I don't do it. It's just one of those things I was thinking about until this most recent appointment. So now, I'm in my early fifties, if I do this job for the next five or six years, it's time to go. I don't know if I ever will put my feet up entirely. Perhaps what I will do is find some more time for myself."
Cecille

"I think I had a combination of good luck but I also had a positive attitude, an attitude that was willing to try and capitalize on opportunity, to improve things."

General Background

After completing her MBA, Cecille worked for the federal government for four years before taking a position as a consultant with a management consulting firm. She returned to the public sector seven years later when she became the Vice-President of Planning and Corporate Affairs for a federally owned corporation. After serving in this capacity for two years, she was approached by a communications firm in the private sector and joined them as a vice-president, subsequently being appointed President and CEO. About five years later, Cecille resigned to become President and CEO of a large multi-national company, the position she currently holds.

Home Environment

Born in Eastern Ontario in the mid-forties, Cecille's family moved to Western Canada when she was a young child. Her father, a civil engineer, ran his own company. Cecille described her childhood as a bit unusual: "Even though I am the third child, I'm kind of a first child. My older brother and sister were born before my father went overseas from 1940 to 1945. After he came home, I was the first of two children. So, I was the oldest child of the second wave of the family. And I think my older brother and sister never had the same advantage of having as comfortable a relationship with my father because those five years were crucial years in their lives. And of course, I was the new post-war darling. So naturally, there was some resentment on their part. But I come from a family of strong personalities. My brother and sister are accomplished people with strong personalities. My older sister is a lawyer and you know there aren't many female lawyers who are in their late
fifties. And my brother is a university professor. My younger sister also has a strong personality. However, she became schizophrenic in her late teens. So, she's still a strong personality, she's just a strong schizophrenic personality now.

"Also, when I was quite young, my mother was diagnosed with a debilitating disease. It took us a while to realize this because it's a difficult disease to diagnose. In retrospect, she probably had it the bulk of my life but it really started to show when I was around nine or ten. This meant that my father had to play a bigger role in the home at a time when single parenting was not a common occurrence and there wasn't the accommodation available for a parent who was trying to look after kids in school and trying to be a successful professional. It also meant we had housekeepers who were paid to run our household which was also not common. So it was an environment where I was pretty independent but solitary.

"When I look back on it, I think that was very significant in terms of what has happened since. I had to be independent and I had a shortage of what you would call traditional role models. I had to make up my role more. I read a very good study of the development of sex role stereotyping in women. And the women who had the least stereotypical behaviour tended to fall into certain categories and one of those categories were women who had either a sick or a deceased mother. And when I read that, I thought, well, that tells me something. And at the time, I looked at my successful female colleagues and they fell into some of the other categories, like oldest girl in the family of daughters. There were certain categories that were predictably going to have more women in them who had less traditional role identification."

**Education**

"In our family, academic achievement was taken for granted. I used to get teased if I came home with a ninety-six percent on a test. They would ask who got the other four
percent. I don’t mean that they denigrated it. I just mean that it was expected. I skipped a grade. My older sister skipped two grades and my brother and younger sister also did well in school.

“Although I didn’t always succeed, I aspired to be at the top of the honour role or at the top of the class. I remember a year when I had a collection of one hundred percent exams that I kept in a box in my desk. I had this sort of little game with myself where I aspired to have a lot of exams on which I got a hundred percent.

“When I got to high school, I always aspired to have all my marks in the honours category or the next level down. In my graduating year when I wrote the standardized exams, I wanted all my marks to be honours, everything above eighty percent. And I succeeded and won the city’s graduating prize.

"But for me, getting excellent grades was easy. By the time I realized that everybody couldn’t get good grades easily, I was already well along getting them. So, I didn’t feel pressure on me. The most pressure I have ever felt is when in fact I had more expectation on me than a human being can possibly stand. But when I look back, it was true. I had more expectation on me than a human being can possibly stand and it was hard to get everything done.”

After graduating from high school, Cecille went on to university to pursue an undergraduate degree: “At a time when people didn’t necessarily take it for granted they were going to university, it was just expected that I would be going. My father felt that if you went to university, you were a more interesting person. So it wasn’t vocationally oriented but rather it was more about being a rounded human being.”

Career Aspirations

It wasn’t until her mid-twenties when she enrolled in an MBA program that Cecille
began to seriously consider what she would be: "I actually didn't decide on a career till quite late because frankly, my primary considerations through most of my twenties had to do with romance. I made decisions related to the man I either married or wanted to marry or whatever. What I was doing tended to be secondary for quite a while. I was pretty traditional in that regard, but we're talking the late sixties. I was also pretty traditional in my view of my expectations of what I would be and I didn't have a clear-cut notion that I was marking time to have children. On the other hand, I didn't think I was going to have a brilliant career either.

"When I left university, I worked for a year waiting for my boyfriend to graduate and then we came out here. Since he was going to work out here, I had to think about something interesting that I could do, so I pursued an MBA, thinking that would be an achievement. By that time, I had a BA, a BSc, and a partial MSc, but pursuing those degrees was just kind of having fun at university. By the time I started the MBA, I thought I would like to be a university administrator. It was the first time I entered university with the intention of coming out with some kind of vocational learning.

"So that's pretty indicative of an awful lot of my twenties. I would find myself something sort of interesting to do in the situation I was in, and the situation I was in was usually defined by my romantic life. It's not what you expected of a hard-driving CEO, is it?"

Although Cecille became a CEO without a definite plan, she knows friends and colleagues who had very explicit career aspirations: "When I was going to university, there was a friend of my brother and sister who wanted to be Prime Minister. He was about twenty or twenty-one years of age at that time. His name was Joe Clark. And the fellow who proceeded me as the CEO in the first organization that I led had had a series of five-year plans. He was going to be a banker for five years, then a chief financial officer for five years and then be a president for five years. Then, he was going to have his own venture
capital business for five years. He was a smart guy and very capable and he did it all and I really admire him. And he is a testament to how you can get to be a CEO by having a series of clear-cut plans. On the other hand, I was five years behind him but I attained the same job. He got there with a plan. I got there with what I would really call a random walk. I'm a little later. So I don't know if I had to have an extra five years to get there or not. But you can get there from more than one route. And he and I are kind of a testimony to that. He did most things right. And I didn't. But we still ended up in the same place. I think I had a combination of good luck but I also had a positive attitude, an attitude that was willing to try and capitalize on opportunity, to improve things.

Personal Characteristics

Interests and Hobbies

When Cecille was growing up, most of her interests centered on the arts: "Up until the age of fifteen, a lot of my focus was on ballet and art. I was a ballet dancer and I loved ballet dancing. I took art lessons because I loved art and things like that. But in those, although I wanted to be the best, I wasn't and I wasn't upset that I wasn't the best."

However, Cecille did enter a city-wide art exhibition when she was about thirteen years old. Four of the eight pictures she submitted won first place and two of them placed second.

"At the time, I was very proud of that achievement, but I only remember one picture. Our art teacher was attempting to push us to abstraction and I completed it before I learned anything about cubism. At the core of the picture was kind of a bird and I repeated certain patterns and rhythms right out of the picture and coloured units of the bird in different colours. And after winning, I remember wondering whether I had won because it had appealed to the judges that someone in grade four or five was trying to think in abstractions."
Since this was in the fifties, it would have been quite exceptional. Today, it would be less so.”

Today, Cecille is still winning awards. On her credenza are displayed just some of the awards that she has won as a prominent business leader.

Cecille also likes to read, an interest she has enjoyed since childhood. It’s rare if she doesn’t have a book in her purse: “I am a voracious reader of fiction. I don’t especially like practical books except the kind of non-fiction that Norman Mailer writes. I used to always say I read so that I could learn alternative ways to live life. If you read enough fictional lives, where enough people face enough dilemmas, then at least you have some tools for dealing with somewhat analogous situations. But I think it’s a bit of just being curious. I also enjoy biographies. I just like to know stuff about human beings. It’s human beings and their lives that fascinate me.”

Need for Achievement

Cecille likes to achieve things and increasingly makes things more challenging for herself. While in the midst of pursuing her MBA, she and her boyfriend saw an advertisement indicating an opportunity to complete part of their MBA in French: "We said that sounds pretty interesting. So we went off and did it. We added to our MBA the bilingual dimension which was very much a reflection of the mid-seventies when Pierre Trudeau was pushing bilingualism. You know we were thinking, 'If we are bilingual MBAs, the world will be our oyster.' And actually, it was. In the midst of that, in case it wasn’t challenging enough taking an MBA in French when you were from Western Canada, I got pregnant with my first child. So, I graduated with my MBA, my first child was born two weeks later and I had a job."

"To a certain extent, a lot of my career has been about doing interesting things. One of my previous partners told me that my biography reads like a 'need for achievement'"
resume. And maybe that's a different way of saying a version of the same thing, that I've needed to feel that I'm accomplishing something. It doesn't necessarily have to have a long term. It's just that I need to feel that I'm doing something worthwhile."

**Flexibility**

Cecille believes that one of the traits that a CEO must develop is flexibility—the ability to quickly adapt to the environment. Early in her career, Cecille took a position with a management consulting firm, a position she also welcomed for its challenges: "Consulting is a wonderful job for a need for achievement person. It offers practical experience in developing the flexibility that is needed by CEOs to quickly adapt to on-going changes. I really liked the different opportunities that came along and I welcomed the opportunity to work in a new field of emerging technology which had a constantly evolving environment where there were frequent demands to adapt to change."

**Creativity and Divergent Thinking**

Another of Cecille's attributes is the ability to think creatively: "You know how certain quotations hit home. One of the quotations that I read by Linus Pauling said, 'Genius is the ability to see what everyone else has seen but to think what no one else has thought.' Now, I don't think I'm a genius but I do think that I have a gift of seeing what everyone else sees but thinking something different. Sometimes I think that the signals that I receive are different than those that other people receive because I tend to interpret things automatically, sometimes a bit differently. Just like some people are dyslexic and they capitalize on it. For example, Winston Churchill. He made being dyslexic into something special by increasingly relying on the spoken word and on communication through words.

"I have been trying to understand this characteristic about myself and to capitalize on it to the benefit of my work, the people who work for me and the company I direct. To try and understand that if you have a potential to contribute in a particular way, to try not to
constrain yourself from using it.

"It's interesting. My husband and I really enjoy theatrical musicals and one of the things we do is to go to a musical and then talk about how we would fix it. And in a way, I thought if I had chosen a different career, I would have liked to have been an editor or a book publisher. In some ways, my creativity is almost better at the second degree than it is at the first degree, that I'm almost better taking raw material and making it great rather than generating the original raw material. And in a way, that's what I do in business. There were fourteen hundred great people when I came here. But they didn't have much focus. My creative contribution has been to focus them and to give them a vision and to talk to them about how we, with this focus, get to that vision."

**Working/Thinking Smart**

Since childhood, Cecille has looked for ways in which she can maximize the use of her time: "I remember I had a route to school that I tried to keep as safe as possible because I would read a book on the way. I had to find my way down the curb to cross streets, so I tried to use streets that were not too busy. And my route had to be pretty predictable so that I didn't fall down on the way."

Both on the job and at home, Cecille has developed techniques to get her work done more efficiently. One such technique is not to do other people's work: "There are CEOs who have come up the financial chain and when they're president, they are highly tempted to do the chief financial officer's job and their chief financial officer has a horrible job because they are being second guessed by their boss all the time. I've always sort of taken the position that I don't need to do anyone else's job. And I apply the same strategy in my role as a mother. I see parents helping their kids to study and everything. Now, no one in my family ever imagined you would get help with your homework. And in a way, I've perpetuated this. I had at least one child who was lazy and would have taken my help if I
would have given it. But he's smart. So I told him, 'If you want to do grade seven, you do grade seven. I've already done grade seven. Do your own homework.' But if I had a child who needed help, I would give it."

Cecille also believes that it's important to be aware of the distinction between working long and working smart: "A lot of work, even in senior positions, could be done more quickly if one is motivated to do it more quickly or if some thought is given to how to do one's work more efficiently. In a way, it's what I sell to companies in terms of reengineering. You know you can reengineer your life."

"However, there are times when you do have to work long hours. But, you don't have to do it forever. You have to recognize that there are times when you should do it, when doing it will enable you to accomplish things that will move you along. And, there are times when you don't have to do it. I have seen the benefit of clear-cut goals."

Another of Cecille's strategies is to focus only on the important at the appropriate time. One of her colleagues has remarked to her, "I notice that you actually don't pay much attention to some things while they are developing. It's as if you consciously know that a lot of things or details are going to change before it gets to a point where you have to make a decision. I notice that you only focus when it's pretty well done and it's time to pay attention. And then, your attention is efficient."

**Self-Esteem**

By midway through public school, Cecille was not well liked by the other students in her class. She described herself as being the stereotypical bright kid: "I was far and way the least popular girl in my grade five class and I deserved it, sort of. I think when I was in grade five, I was an especially smart, obnoxious person and all these kids who had been with me since grade one were tired of me. I also got glasses that year. So then, I was this especially smart obnoxious person who wore thick glasses whom they didn't like very much."
But life dealt me a great opportunity. I skipped Grade six. So, I didn’t have to be with those kids anymore. I had a bit of a chance to remake myself, although most of it was unconscious at the time.

"I think I became less of a know-it-all and I think I felt less like a know-it-all. And that was desirable. When you put somebody, especially somebody immature, into a situation where in fact they do kind of know it all, they become rather unpleasant to be around. When I look back at myself or when I look at one of my children who is a know-it-all right now, it’s not that much fun to deal with this type of person. And yet he is quite a smart kid. He just needs more challenge. And I think I needed more challenge. Then, you don’t know it all.

"And I think a part of it is also being over-familiar with one’s colleagues. You can get confused about the reality of your values. You can get an incorrectly founded sense of superiority, which is part of being a know-it-all. You think you’re smarter or better than they are. Of course you’re not, but when you’re immature, you don’t know that. So, that was a part of it. And, because my birthday is in the early part of the year and the school used a December cut-off, I was one of the older kids in my class. So I was probably a bit older in my peer group and by skipping a grade, I got to be one of the younger ones in the peer group. In grade five, I was too visible. But in grade seven, I was kind of invisible. And that was better.

"So skipping a grade gave me a chance to be reborn but to also be born different. It was really two sided. What I mean is it had to do not only with popularity. I was unpopular because who likes a kid like that, but I also think I didn’t like myself either. So I had a chance not to be unpopular but I also had a chance to like myself better too.

"From that experience I learned that you can be perceived as the smartest person one day and not be seen that way the next. And that’s important. My language training was
like that. When I was doing my MBA in French and I didn't have a facility of the language, sometimes I could tell from the expression on a person's face that they thought I was dumb. And that was a very good lesson in humility—about how you're not dumb but can be hindered in some way in communicating and seem dumb. And so it was that kind of opportunity that I had and it's great if you get it early on in your life."

**Self-Confidence**

"When you get senior enough and confident enough about your ability, you relax. And what's interesting is being relaxed makes you more successful because people start to perceive genuineness in you. Yesterday I was at a meeting with a bunch of business executives and I came away thinking how many of those guys seem like genuine, nice people. And I began to wonder if there is a correlation there: Is it because they are relaxed, genuine and nice people that they are successful? But, it's also that success had made them that way because once you get a certain level of power, you kind of feel free to be yourself.

"Early in my career, people started describing me as a breath of fresh air and I said to my secretary "If I have to be described as a breath of fresh air one more time...[laughs] What they were trying to capture, and I guess they were trying to be flattering, was that I am a person who is usually quite open and relaxed. And sometimes, a bit outrageous but then this is not an expose! [laughs heartily]

"Possessing self-confidence also liberates you. I get invitations for all kinds of events and could be out twice every night and lunch everyday. But I want to spend time at home with my kids so I really try to go out as little as possible at night. So maybe I'll be out one night, whereas I could have been out every night. And as I've gotten older, I've been more willing to assert that I don't do breakfasts because I don't like meeting people at seven-thirty in the morning. At a certain level, I also think you are better off not being over-
exposed. Maybe because I was over-exposed by grade five, that has something to do with feeling that way."

Handling Disappointments

Cecille believes that her success has had a lot to do with personal judgement and how she handled those times when she used poor judgement or was unfairly treated: "Lots of the positive stuff in my career has had to do with good judgement but similarly when things have not gone well with me, I have used bad judgement. And so there are times when I put myself naively into difficult situations—situations, where there might have been unnecessary conflict with colleagues or where there was a good chance that the net result was going to be me losing. I've never been close to being fired, but on occasion, sometimes out of naiveté, differing priorities, or just plain bad judgement, I have done career limiting moves. I think it's really important, certainly in a study, to recognize that everybody makes mistakes. We all do stupid things. I have had dark, dark moments when I wanted to kick myself around the block or when I thought, this time you have really done it. Cecille. You're not going to have a very bright future.

"So, there were times when I was the architect of my own misfortune or my own career limiting moves. But there were times when I was just plainly unfairly treated. Interestingly, I just went on to the next thing. That's probably been my saving grace, that I didn't dwell on it. And sometimes, the disappointment of losing a particular opportunity and the ensuing upheaval can really be a positive event. When you look back on it, you see that it changed your life for the better. And I've always felt that I've never regretted anything that has ever happened to me. I've always felt that each positive or negative change has led to a bunch of new opportunities."

Significant Accomplishment

Hard work, integrity and dedication are values which Cecille's father espoused and
reinforced in discussions with her. In many respects, one of Cecille's early accomplishments encapsulates many of her personal attributes and strategies for working effectively. She described the project as an extremely difficult job and the kind of thing that is a "career maker".

"As a consultant, one of the projects in which I was involved required putting together an important application for a business venture. It was the last three days before we were required to submit the application. I virtually never went to bed and the tension and the stress were enormous. I was in charge of putting it all together and it was slightly older technology. At some point, somebody came to me and said, 'We have three hundred hours of printing to come out of the computers and there is only forty-seven hours till we have to file the application.'

"So I said, 'Ok, let's take this apart. What is it we're printing?' There were seventeen different applications for seventeen cities. But in each one, there were some things that were in common and some things that were different. So I said, 'Let's isolate what's the same and print that once, not seventeen times,' which was the way it had been going. 'And then send someone to photocopy the stuff that's common. In the meantime, try to print only the things that are unique to each application.'

"So, we started breaking down the task. Even just that one thing of not looking at this as seventeen computers spewing out seventeen different applications took hours out the job. And we used different technologies too. We used the computer printers to make all the masters and then we photocopied the common stuff.

"But I have to tell you something funny because it stands out in my life. You know how you hear about people doing things like shaking their finger or stamping their foot. It sounds so Shirley Temple and ridiculous. I actually stamped my foot when they first told me about the situation. It's the only time in my life when I stepped out of myself and saw myself
doing it. I can't believe that I'm stamping my foot. [hearty laugh] You know, some of these things are arguable and reactive but it's good to know things about yourself."

And this accomplishment was a career maker. Two years later, a senior executive of a very high profile corporation came to see Cecille on the basis of his knowledge of her performance in that experience and she was hired for a senior position: "Because I delivered a tough thing, there is a prize: senior people see you doing it and know you’re doing it and you have tremendous satisfaction, although at the time, I thought it had taken years off my life. I read something the other day that I had said and you know every once in a while you read something that you say and you think, I'm smarter than I thought I was. [chuckles] I had said, 'How do women get ahead? Take a hard job and do it well.' And in a way that's what this experience was about. I took a hard job, I did it well and people knew. And with that, other opportunities came."

Career Development

Mentors

Cecille commented that the most significant kind of mentoring she received occurred during the period when she was employed by a management consulting group: "The nature of how a small management consulting firm operates is inherently institutionalized mentoring. That is, consulting firms bring people with potential in at the bottom, give them work so they can leverage their skills and build their experience. But, they also want them to seem as capable as possible to the customer, and so they try to make them as capable as quickly as possible. Both the senior colleagues in the consulting firm in which I worked slightly exaggerated, or so it sounded to me like they slightly exaggerated to the customer, what I could do. But then, they told me how to get it done. And it was mentoring because it was growth, encouragement, and challenge at the same time. And that was great! And it
wasn't altruistic. It was practical. You have to do that if you are running a consulting firm. You've got to bring the new people in, you've got to push them, you've got to tell them what you expect, and you have to help them deliver.

"And this was quite a turning point for me because up until then, it may have been female socialization and it may have just been maturation, but I wasn't accustomed to formulating opinions, pushing my views and articulating my vision much. But in consulting, you will fail if you don't do that. You'll fail! I had the good fortune to work with consultants who both encouraged and required that I conceptualize, synthesize and articulate my ideas. But they also basically communicated that if I didn't, I wouldn't have a very good job."

[BLaughs]

Balancing Life Roles

Rather than try to segregate her role as a CEO from that of a working mother, Cecille tries to integrate them: "I don't try and pretend that as a CEO I am not also a mother with kids and I don't pretend to my kids that I don't know that I'm also a working mother. I try to bring it all together into one life. But the most normal tendency is for the work life to push out the family life. But I try not to let that happen. I've always wanted to have kids, be a wife and a mother, have an interesting job, and have fun. I love baseball, going to the theatre and everything. So in order to balance out all the things I've wanted, I had to figure out ways to get it all done. And that was a very positive thing.

"One of my business colleagues used to call me the 'I want it all package'. But if you want the package, then it requires that you think about the balance and how you're going to do it all. And that was great fun. But there are people with visions or aspirations that are more modest. Maybe, they're just more cautious and they end up with less by my definition.

"Actually, I'm unbelievably lucky. In those moments when I've been on a plane and it's making funny noises or something, and I think if that's the engine! In those scary
moments, I don’t have thoughts like, ‘Gee I wish I had done X Y or Z.’ And that’s kind of nice.”

**Gender Issues**

Without her MBA, Cecille doubts that she would have had the opportunities that led to her attaining the position of a CEO: “I think in those days and let’s be realistic about gender, it was hard enough to get opportunities as a female. To get good opportunities without the qualifications would have been really tough. I was also fortunate that the government had a special recruiting program. They wanted MBAs and they wanted bilingual people and there I was. I was a target. So, they didn’t mind that I was pregnant when they recruited me. In those days, that gave some recruiters pause. But the government was more open-minded than that.

"I sort of feel that this gender thing is something that people almost put on themselves. I once made a speech where I talked about what I call the 'presumption of equality'. And I said, 'If you act and behave as though you presume your equal, it’s very difficult for someone else to make you less equal.' And the presumption of equality is kind of what the glass ceiling is about. If you don’t even imagine there is a glass ceiling, then there probably is not going to be one. If you anticipate or presume that there is a glass ceiling, then you’ll find it. You’ve handed an opportunity to other people. They don’t have to exercise their own constraint on you; they just have to use the constraint you passed them to exercise. And so sometimes, it’s good not to be really well connected with other people’s preconceptions and biases. A bit of obliviousness is a helpful thing because once you know, it’s very hard not to be constrained by other people’s prejudices. If you can keep yourself from knowing what they are, then you can keep yourself from behaving in a constrained way."
Appointment to CEO

On the day of her appointment, it wasn't a sure thing that Cecille would become the CEO. At the time, Cecille was standing in as "sort of a surrogate president" but the board had not yet determined what they were going to do:

"I knew they had two issues on the table. Would they appoint me or would they have a search? And I was uncertain which way they would go. So in the great words of a tee-shirt that I used to have, 'When the going gets tough, the tough go shopping.' So, I went shopping. I went shopping because I decided that if I was appointed President, I would need something new to wear and if I wasn't appointed, I'd need a new outfit to make myself feel better. But quite seriously, I went shopping because I didn't think it would be a quick decision, only to find out when I got home, that the chairman had been frantically trying to reach me because he had the good news that I was appointed president. I was, of course, proud and pleased, and determined to show them that they had made the right choice. Although I wasn't necessarily in a hurry to be president, I would have been very disappointed had I not been appointed when the opportunity had come."

Future Aspirations

Cecille's aspiration is to continue to do interesting work: "When I think about what I might do in the future, it could take a number of different forms, depending on what opportunity comes my way. It would be interesting to take time out and write a book, either about business because I know a lot about business or write a work of fiction. On the other hand, there are a lot more interesting jobs in this company including working in other countries which is of interest to me and always has been. This job is interesting right now but there is a long time between now and sixty-five. Trust me! You won't see me in this office fifteen years from now."
Allan

Each of us is in charge of ourselves. So, I've been in charge of myself for as long as I can remember. I take the view that I just happen to be the CEO of a corporation but I have been the CEO of a lot of stuff."

General Background

Allan is the CEO of a large multinational company in the private sector. He began working as a summer student in the mid 1950s. In his third summer at university, he took a position with an organization involved in one of Canada's most established industries.

"Working with the organization as a summer student not only increased my knowledge in the industry but another benefit was the opportunity to look at the company and to try and decide whether I was interested in working for them," remarked Allan. "It also gave them the opportunity to assess me."

Two years later, after completing his M.Sc., he was offered full-time employment with the firm. Over the next twenty-two years, he held a number of positions in both Canada and the United States. In the mid 1980s he was appointed to the position of President and Chief Executive Officer of one of the subsidiary companies with subsequent appointments to the positions he now holds as Chairman, President and CEO of the Canadian corporation.

Home Environment

Allan describes himself as a nomad: "By that I mean I don't identify with any particular place as home, even though I spent a lot of the decade of the forties during the Second World War in a small town in Western Canada. Since my father's occupation required him to move around a lot, I lived in a lot of different houses, never very long in one place. My mother wasn't employed outside the home. Except for those who ran shops and grocery stores, which were normally family businesses, women's work was in the home."
Allan has two younger sisters and he recalled that as a family, they would engage in a variety of activities: "We would play card games, checkers, chess and crokinole—a game I spent many hours playing with my mother. We would also have family discussions and listen to the radio. There was no television back then. And in those small towns, there were other diversions. There would be interesting characters like people who were ham radio operators. That was always fascinating. They would talk to people around the world. And when you lived in those little towns, if you went to a large city that had fifty to sixty thousand people, it was a hell of a deal. There were big stores. You'd see things you wouldn't have seen before except in catalogues. It was only then that you got some sense of what other things were available to you."

Influence of the Community and Times

"During the period in which I grew up, people were hard working, God-fearing and honest. Any expectation of crime in your community was nil. I mean there weren't any police in those small towns. The ethos at that time centered around involvement in the community and issues of integrity and accountability. People took responsibility for what they did. You were in charge of your life, not somebody else. And in those semi-rural, small mid-west countryside towns where I lived, one had to be reasonably self-reliant. There was no agency you could complain to. No one was even going to listen. But, there was a community spirit in those towns. People helped one another. You were responsible for yourself but you also looked after your neighbour."

Education

Since the communities in which Allan lived were small, the schools that he attended had several grades in one classroom: "The schools were small. You could take several grades in one year. Most of my high school years were spent in a tiny four-room schoolhouse in a town with a population of about two hundred people. I was a strong
student academically although I didn't know it at the time. In hindsight, school was easy. When I think back on those days, my expectation was to get one hundred on a test. And on most science and math tests, I would. If I didn't get one hundred, I would be disappointed. I can't recall anytime in my memories of grade school days when I would ever have not done well.

"However, it was only when we moved to a larger town in my final year of high school that I began to realize that I had sufficient academic qualifications that distinguished me and would allow me to compete against others. Before then, the classes in which I participated had no more than five or six kids in them so I didn't know this. Certainly, there were a couple of teachers in that four-room schoolhouse who were quite encouraging and had told me that I had the potential to go to university. But it wasn't until I changed schools midway through Grade 12 that a teacher said to me, 'You really ought to write the provincial exams and see if they will give you some money to go to university. That's probably the easiest money you can get these days coming out of high school.' So I wrote the provincial exams and received a scholarship offer from a university in Ontario."

While at university, Allan's interests were focussed in science and mathematics. Although he had many options, he chose to specialize in engineering. While in the final year of his B.Sc., one of his professors encouraged him to pursue a master's degree: "Part of his pitch was you've got forty years to work, so you don't have to start now, you can start next year. It was during the time of the Suez crisis and although there was a great burst activity in North America, it didn't end the prevailing recession. People were having trouble getting jobs. In fact, as I look back in hindsight, this organization didn't actually hire anybody the year I graduated. So one of the benefits of staying in school was I had something to do."

After completing his M.Sc., Allan decided against pursuing further studies: "I came
to the view that to pursue another advanced degree, either one had to have some interest in teaching or some interest in pursuing fundamental research, neither of which I had a lot of enthusiasm for. So upon completion of my masters degree, I accepted an offer of employment to work in Western Canada for this organization."

Influence of Education

Although Allan couldn't state unequivocally that he would not have become a CEO without the degrees he possesses, he did say that graduate studies gave him the opportunity to learn how to think in a more disciplined way: "University gives you some kind of reference base, one that is wide enough so that you can put things together. You also learn how to seek out others who may helpful to you or with whom you can consult. So I guess, in many ways, it didn't matter if I took chemical engineering or if I had taken something else. What I learned at university was some kind of fundamental thought process. What university does is get your head right, your thinking processes right. This then serves you very well because life is one great big learning experience. I don't view formal education as some kind of end point, so much as a part of a continuum."

Career Aspirations

Having a specific goal for one's career was uncommon at the time Allan grew up: "One of the things on which I look back with fascination is that many of the kids with whom I went to school in grades seven, eight or nine didn't have any aspirations. And I don't know why. As a kid, I always thought, gee, it would be great to play for the Green Bay Packers. Well I gave that one up a long time ago. But they are the wonderful dreams you have as a child. They're like romances that develop in one's mind from the imagery one gets when reading books, looking at maps of the globe, or watching television. Back then, listening to a hockey game out of Toronto on the radio, you'd hear about Max and Doug Bentley from
Delisle Saskatchewan, Ted Lindsay and Gordie Howe—the folk heroes of the day. And with those kinds of things, you would have to imagine what it was all about. Maybe you would see a hockey game in some larger city but generally where I lived, we would play just amongst ourselves.

"And the kinds of romances that exist today in society didn't exist then. There was no television to watch when I was a child. Maybe once a week, we'd go to the movies. Somebody would ship in a movie of three or four reels on the train to the little town where we lived and we'd watch one reel and it would all shut down. Someone would change the reel on the projector and we'd watch the next one. So where do these kind of romances come from? I think they only come from whatever imagination one develops from these types of things.

"It's interesting that in the last twenty years or so, my father told stories about himself or his aspirations and how he would have liked to have done something else. And I guess my sense would be that he had some inherent desire for his children to achieve something greater than he did. And, I suspect that was true for many people. How that gets translated into one's drive and desires has always been a mystery. There were certainly many kids who didn't aspire to do anything more than their father did.

"But then, at that time, you weren't exposed to all the possibilities. So I think what one did was to eliminate the things you didn't want to do as opposed to focussing on what it was you wanted to do. So why would I want to be a farmer or run a shop? In fact, any of those things that were the common artifacts of the small town: the service station, the train depot, the grain elevators, the post office, the grocery and hardware stores. I would look at those things and think there wasn't much excitement in any of that."
Career Advancement

As Allan's career progressed, he recognized from time to time that he was just as fast, smart and quick as other people: "I think if we had this conversation ten or fifteen years ago, I would have said at that time, 'I have a reasonable chance to be a senior officer with this organization.' From where I watch now, I know we try to keep several horses in the same race for succession for certain positions. So, I don't think one plans one's career so much as one conducts one's self in ways that bring recognition to the work you have done. You not only have to do the job well but other people have to see you are doing a good job. You have to conduct yourself in such a way that whatever it is that you have done, you are recognized for doing it. But it's equally important to recognize that the things you didn't do also distinguish you. The reality is that lots of times we talk about so and so did something that was beneficial to the corporation but there is the other conversation about what he said he was going to do and didn't do.

"Now I didn't stay in any one job too long before I was moving on to the next. I suppose I was a rare bird in many ways because I can't identify in the last ten or fifteen years anyone who moved as rapidly. I had come to work in the early sixties and within ten years had worked in the head office in the states as a number cruncher and held possibly seven or eight different jobs in the field. But in reality, there were probably only two or three of them which were of significance. By the time I came back to Canada and appointed a Divisional Manager, I would have already been recognized by a number of people as an individual who gets the job done.

"As I look back, when I went to the corporate office as a number cruncher, this was obviously one of those cases where people thought I had substantial potential because they gave me new job experiences where I would become known to a wider category of people. And I guess in terms of big projects that made a difference, the most significant event of
that nature was in the middle seventies when I was in charge of an extremely large project. I ran a cadre of people involved in that endeavour and it would have been seen in the corporation as having a pretty high profile. A new division was established and I was appointed a senior officer of the company and subsequently went to the US again as a Senior Manager. By that stage of the proceedings, there was a pretty wide recognition of whatever capability I was seen to have.

"I guess at the time you don't necessarily know, but when you look back in hindsight, I think one of the first measures or tests that any senior executive goes through is whether they have the intellectual ability. I don't know of any senior officer in the company today that doesn't have very good conceptual skills, the ability to view the planet from a whole bunch of different elevations. So if one displays that, I think those kind of people tend to stand out. I suspect as I think about myself, that I probably had those skills for many, many years. And so, along with your aptitude for the job, if you can take some of kind of program, problem or opportunity, make sense out of it in ways that other people can understand, and you are seen as reliable and consistent and you regularly do what you say you are going to do, that's impressive and you will be recognized as being capable of a senior position."

**Personal Characteristics**

**Interests and Hobbies**

Allan participated in the usual kinds of things that every boy did who grew up in midwestern Canada during the late thirties and early forties: "I skated, played a little hockey, competed in track and field events, went to the movies and participated in Cubs and Scouts. I also read a wide range of material. I used to go to the library regularly and scoop up a bunch of stuff from whatever they had. I don't remember any titles in particular, just that I read a lot of books."
Allan has also spent many hours curling: "It was great diversion. It's one of those games that depends on you and it depends on your team. It's a game of skill. It's a game of strategy and a good way to waste away a couple hours of time. And I did that for years and years, fifteen or twenty years ago."

Early Accomplishments

The accomplishments that Allan identified as being of significance during the early years of his life were academic in nature: "I was a reasonably good student although I didn't recognize that until quite a bit later in life. In terms of accomplishments, when attending university, showing up the next year with enough money to continue to go to school would have been an accomplishment. The tuition back in the fifties was five hundred and fifty dollars or something like that, which was a lot of money. For the most part, it was two or three times more than the monthly pay of any job you could get as a summer student and it was equivalent to about one month's pay when you got out. And things haven't changed. Today students pay three thousand to four thousand dollars in tuition per year but that's what they are making per month when they graduate. So, when you think about that in relative terms, it's about the same. Now of course, I think students demand a bit more these days to get enough money to go to school. Back then, none of us would have thought about borrowing much money. Nobody had cars. If you owned a car, that was a hell of a big deal!"

Significant Decisions

For the first twenty-five years of his career, Allan was principally involved in the manufacturing and production side of the industry. On a number of occasions, he had to decide whether he would stay or leave the organization: "It wasn't unusual, in fact, you'd be disappointed in the mid-sixties if you didn't have some guy come around knocking on your door offering you an opportunity to go work for somebody else. And most of those were
relatively small companies looking for trained people. I guess there were at least two or three occasions when I would have had an offer in hand that would have forced me to think about whether I wanted to stay or go.

"As time went along, it became clear to me that, 'Hell, I am as good as any of these guys we've got here. I can easily aspire to or attain essentially the same job in this organization as these others guys are offering.' So in those instances where I had to make a choice to stay or go, that kind of self-assessment certainly served me well. Of course I continued to progress so that by the late seventies, early eighties, I was a senior manager and then president of one of the subsidiary companies."

**Doing Your Best**

Putting forth the effort to do one's best is one of Allan's core values. For example, when Allan joined the organization, the company had a very extensive training program that over the course of about a year and a half gave employees exposure to many facets of the production side of the business. As part of that training, he was sent to a school in the United States to learn about the latest advances in the engineering techniques being used in the industry: "I did very well academically. It was no different than when I went to school as a kid. If I didn't get close to a hundred, I was disappointed. I stood first in this class of fifty guys that came from various divisions of the US parent company."

When Allan came back, he was assigned to one of the company's engineering divisions to work on a project which had to be completed within a strict timeframe as the company wanted to transfer him to their research division for further training. Part of this project involved submitting an application to a regulatory agency: "When I successfully defended the application, many individuals complimented me on the way I had handled that engagement with the regulators. So I guess I was identified as a person who was academically inclined, had a broad range of interests, and could be counted on to get the
job done. After working in the research division, I again returned to Canada and was assigned my first supervisory job managing a small group of men.

"So my view is that each time you do a job, you have to do the very best you can. And I think those kinds of experiences were ones that would have identified me in the eyes of management as a strong performer. But I don't think these are episodic kinds of events. When I think back on some of those things I ended up doing over that period of time, they were probably all instrumental in building whatever file existed around my capability and what I could do, which is part of the process of identifying individuals. Because you see, it's all relative. The only reason that Gretzky stands out in hockey is that there are other guys who are not as good as he is. That holds true in organizations too. I think I was the kind of guy who was able to get a bunch of things done reasonably well and was seen as someone who was ethical, consistent and reliable."

Accountability

Being accountable is another of Allan's core values: "I think that accountability is one of life's elusive concepts and probably is a shortfall of many people. We live in a world where many love to syndicate the risk and decision making as opposed to really taking charge, being accountable for their actions and the results. Individual accountability is one of the factors that distinguish those who can and those who can't. Over the years, I've seen more people whose performance has suffered in the eyes of others because they were not accountable, or didn't view themselves as accountable, or didn't want to be or couldn't be accountable, for whatever reason. So it's a very tough concept.

"There has also been a tremendous change take place over my lifetime in the expectations people have of themselves and each other. Back when I was growing up, a European ethos was predominant in the communities. Every adult had someone in their family, an uncle, an aunt, a father or mother who came from somewhere in Europe. So, it
really was a kind of world where you looked after yourself, looked after your neighbour, but you were also responsible for yourself. Now we have evolved somehow to believe that someone else is responsible for your life. There's been a tremendous turn in the way we perceive government investing in us.

"Reality is, everyone is the CEO of their own job and their own life. Each of us is in charge of ourselves. So, I've been in charge of myself for as long as I can remember. I take the view that I just happen to be the CEO of a corporation but I have been the CEO of a lot of stuff."

**Balancing One's Roles and Time Management**

In response to the question as to how he balanced his career aspirations with his personal life, Allan responded: "Balancing one's professional and personal roles is a matter of how you are going to allocate your time. We all have 168 hours a week. If you decide to be engaged in work for fifty, sixty or seventy hours a week, sleep seven hours a day, and tend to crucial health and welfare needs for an hour a day, there are not very many hours left that are discretionary. Maybe, forty to fifty hours a week. So then, you have to decide what you are going to do with those. Are you going to watch television, read books? And depending upon the phase of life you're in, you use that in different ways. When one's family is relatively young, you find ways to engage in their activities. But these are relatively short periods until they're off and doing something and you have to find things in which you engage yourself. There are also certain people in your life you want to please and you enjoy being with, so you have to find ways to do that. So one of the ways that I've found to do that is to be in the office very early. I'm kind of a strange guy. I've been in the office at six in the morning for the last thirty-five years. So the discretionary time for my family comes from being in here at that time. They're not up at five in the morning.

"And sometimes, people will determine whether they are going to do something or
not based upon its acceptability in the eyes of others like their supervisor or manager. But that wasn't a struggle for me. It wasn't what my supervisor thought that was important, it was what I thought. I am the guy who is responsible for my work. However, as my responsibilities increased, I had responsibility for other people. And then I always had a debate with myself, wondering what others really thought it was worth. Because in any kind of organization, if you have a helper, two helpers or a hundred helpers, eventually they work directly for you to do your project. Or, after a while you may be the supervisor of a group working on a variety of projects. Now by definition, if you have responsibility for the work of others, you are the manager of that group. When that happens, I think the biggest issue is to let go, to give them the freedom to conduct their own lives. Because I think, when you get to the view that you are responsible for yourself, it's hard then not to start to say that I'm responsible for them.

"Then, you start to break one of my rules which is not to worry about something that you can't do anything about. And, I can't do anything about them. Only they can do something about them. And I think one of the classic dilemmas of the first time supervisor or manager is to realize that while people hold you responsible for the work of others, you have to find ways to make those people accountable for themselves. If you somehow or other get yourself all fussed about why Fred or Joe or Jim can't do that job, then you can get yourself into a lot of mental anguish. So, you've got to come to grips as to why they can't do their job and maybe you can do something about that. Possibly, they don't have the skills. Maybe they haven't got the training. Maybe they don't understand the job and you need to talk to them. But if you somehow adopt their cause, you can really get yourself engaged in things that you can't control."

Making Choices

For Allan, the essence of time management is to decide what not to do: "There are
tremendous pulls and pushes on you to engage in more than you can reasonably do and to concern yourself with things you can't do anything about. In today's' world, there is a tyranny of choice. Just think how difficult it is today to choose a car to buy. When I was a kid, the big event was to go down to the auto dealer in September and see the new models. There may have been ten or twelve of them in the whole town. Now there are five hundred models. The same tyranny of choice affects how you are going to allocate your time. On what basis are you going to decide? You have to have some way to do that. So, I think the issue of balance becomes one of managing time by whatever means you can. If people have trouble doing that or if they get over committed, then I think they find themselves in very stressful situations, particularly if they get over committed and worry about things that they can't do anything about. Man, that will wear you out in no time."

Allan acknowledged that earlier in his career, he did find himself in these kinds of stressful situations but over time he learned how to avoid them as much as possible:

"Maybe its one of those things you pick up in your experience somewhere. As I mentioned, a long-standing rule of mine is to only worry about those things that I can do something about. There are a lot of things in life that you can't really do anything about and those I get off the agenda. They aren't worth worrying about. Sometimes, they're just a diversion and you don't know that at the outset. But one can also choose to be diverted.

"It's been my observation that we all get entrapped. There are more things to do than there is time to do them in and we have to make choices. We all need to have some principle by which we will do that. Now some people are able to do that with considerable dispatch and others, they wander around for a long time and never make up their mind.

"Now, how I allocated my time was not a burdensome issue when I was going to public school and high school. There weren't a lot of choices. It was only later on, when people started to provide me with a greater number of things to look at or to study, that I
had to decide how I wanted to use my time. And I think I've come to the view that we do that by deciding on the things we are not going to do. Consciously or unconsciously, there are certain things we are not going to do. And then that gets us back to the few things that we have an interest in doing."

Remaining Focussed

The ability to remain focussed on what's important is one of the ingredients Allan attributes to his success: "One has to have some way to disengage from diversions that have no usefulness to you. When I went to university, I saw television for the first time. Many of my contemporaries who went there also grew up in small towns and didn't have television sets either. And so, as a student, you could go to a common area and watch television. Now some guys were actually mesmerized. They had kind of Orphan Annie eyes. They were just glued to it. And others looked at it and thought, 'Hell that's kind of interesting, so what!' Today its the Internet and I refuse to get myself diverted speculating about it, except what influence it will have on my business. I guess a long time ago I decided that I'm not going to mess around worrying about learning the Internet and all that stuff until I retire because that's a project I can take on then. Again, it's the use of time."

Handling Change

Allan believes that that our ability to adapt to change or to find a way to comfortably handle it is an important indicator of how well people will do: "I moved seventeen or eighteen times with the company as well as moving a great deal when I was a kid. I was recounting some of my history the other day and I remember living in twenty-five different houses in my lifetime. And most of the kids with whom I grew up had parents or grandparents who had been born in places other than Canada. So when you look back, our ancestors were a nomadic and active people. Moving for them would have been just another adventure."
"It wasn't any different for me when I left home to attend university. I got on a train one day and two and a half days later I was in Ontario. Up until that time, I'd never been east of Winnipeg. When I got to Ontario, I found that there were four seasons and there were really trees and all that other kind of stuff. And so here I was, age eighteen, in a strange city. I didn't know where the hell I was. But at the time, I would have viewed it as just another one of those nomadic adventures, one of those kinds of experiences that are quite useful."

"And when the company would ask me to move, I never had a debate with myself about whether I was going to move or not. I just assumed I would. That's just the way it was. Nowadays, it's amazing how many times I hear someone say, "I can't move because I've got a kid in grade six. I say, 'Bullshit! I mean I moved so many times. Hell, I moved in the middle of grade 12, my final year of high school.' Perhaps, it was easier then."

Impact of Change

Allan remarked on the tremendous changes that have taken place in his lifetime due to the developments of technology: "There's a definition of technology that I think is wonderful: 'Technology is everything that has happened since you've been born because everything else was here when you got here.' And, technology has changed things. We now can communicate instantaneously. When I grew up we got our information via radio and dispatch. Now we have the personal computer. It didn't exist until the eighties. The cellular phone wasn't marketed until 1985 or 1986. Now one in three people have one. You see I think the issue of technology and information is that it compresses time and space and changes the nature of work and play. And the implications of that are really fascinating to muse about.

"When one thinks about the pace of the age in which I grew up in, I had a lot of time and I had a lot of space. I could decide to do whatever the hell I wanted to do. It was not a
very hectic life. And I suppose the result of technological advances is that in today's world, there is a compression on the availability of your space and your time. Unless you have a set of rules, it's a bitch. We all develop whatever coping skills we have, no matter what our age is. People talk about there's more stress but we put more stress on ourselves. One of the factors of today's world is what I would call the CNN factor—that somehow we're convinced that there is more shit going on in the world. I'm not convinced of this at all. I think it's basically the same stuff; we just hear about it sooner."

Handling Disappointments and Successes

Allan's tendency is to view both his successes and his disappointments from a rational point of view: "I tend to be a guy who either by habit or training views himself as a rational thinker. We are all defenders of whatever it is that we think is going to happen. Successes and disappointments are just the pluses and minuses from the status quo. But I am not of the view that we should expect the status quo. Reality is, we don't deal in a certain world. We deal in a world where we should be able to anticipate the likely range of outcomes so that we are not surprised either by the good things or the bad things. If we conduct our affairs right, we get neither except for happenstance or chance, like winning a lottery.

"So, when I think about successes, you can have them in the sense that you didn't expect them or you can have them in the sense that you expected to do whatever it is you set out to do. And I suppose, one would always want to have some kind of celebration of their successes with their friends and family. And I would always try to do that. But, I tend to be a bit stoic about some of these things. When my predecessor was appointed CEO, he would talk about what happened and he had a big celebration. In my view, I was going to get this job some time ago. It wasn't a surprise. Let's put it that way. It was a happy event in the sense that it met an expectation but it was not a surprise."
"On the flip side, when things are not going well or if things are not meeting my expectations, I go back and ask myself, 'What were the first principles by which I came to the conclusion that I should have done well? Was there something that could have been done by myself and/or others that would have changed the outcome?' And from time to time, my timing doesn't go well, in the sense that it isn't as good as I expected it to be. Or some elements of my personal life didn't go well. Then I say to myself, 'Is there some explanation for this that I could have done something about?' I try to sort out the myth from reality, the cause and effect. And if it's something I couldn't do anything about, then I just have to accept it and carry on.

"But there's lots of times when confusion kind of reigns around whatever is going on and you try to go back to first principles. And there are times when you know what the first principles are but you can't necessarily always execute these exactly right or get it done that way for a variety of reasons. Then you have the questions, 'Was it due to the level of my skills or the allocation of resources? Was there something I could have done differently?' And I guess that's all part of what I think of as the rational thought process."

**Handling Stress and Risk-taking**

"One of the things that has always fascinated me is people will say, 'Gee, you must be under a lot of stress.' But I just don't identify with that! I would be under more stress coaching the kids' lacrosse team. In today's world, it's an issue of having a sense of comfort in taking risks. You grow up in an industry. You understand the dynamics of it. And you try to translate into your business strategy this view of being in charge of your own affairs and focusing only on the things we can control. In other words, we are in charge of the volume, the costs, the quality of the company's assets—those things that companies look at when they are interested in a merger. If we get all those things right, we are going to win. So as the CEO, I am using the very same thought process that I've been pursuing in
other places for many years and I don't find that stressful at all. We are in charge of the things we can do something about. And if you concern yourself with the rest of it, it can be as stressful as hell if you let it.

"I also think, that for some of us, we are really mercenaries, hired guns who could probably fit into similar functions in other industries. It's just the way we are. But I think we are somewhat different than the entrepreneurial types, the owner operators. We probably have substantially different emotional attachments. One of the necessities of the game is find ways that we don't get overly emotionally attached, that we stay somehow removed from it so we can give some objective thought to the circumstances we are dealing with. But that's not to say that things happen that aren't disconcerting—surprises or disappointments that have emotional outcomes to them. You know there are many people in this game who have worked for the same army for a long time, who are soldiers of fortune. And, we've enjoyed ourselves. We've had a lot of fun."

**Mentors**

Responding to the question as to whether there were key individuals who played a role in his attainment of the position of CEO, Allan remarked, "Sometimes we have mentors but we don't know who they are. We all work with interesting people and they all contribute to our understanding. But somehow, there's conventional wisdom that, if only we had a better mentor we'd do better. Baloney! It's up to the individual to gather an assortment of knowledge from all kinds of different exposures."

**Future Aspirations**

When asked about his future aspirations, Allan quipped, "I guess it's to play better golf. It's kind of interesting. In another few years, it's mandatory retirement. I'll be in a new phase, another adventure, doing something else, learning something different. At this stage, I think you become more and more interested in your offspring, in your
grandchildren. My wife found a wonderful sign that sits on the fridge: 'Mothers always watch their middle age kids for signs of improvement'. That's absolutely true. I think we get to some point now, where many of the things that we engaged our children and ourselves in, we now start to fuss about in our grandchildren. And the fact that we just had this conversation makes me muse a bit, 'Is there something I should be doing now or maybe something I've not done that I would like to do.' Maybe playing better golf is about all I can reasonably aspire to.
Ron

I think it is just sheer challenge that intrigues me. And I think that’s why I’ve been so successful in terms of problem solving and the vision that I bring to my job and to this industry and the industries that I work in.

General Background

After graduating from university, Ron began his career on the West Coast of the United States working for a chemical company as a process engineer. Five years later, he was transferred to the corporate office that was located in the Eastern United States. After a short period there, he decided that things moved too slowly in the chemical industry and being fascinated with logistics and physical distribution, he went to work for a consulting firm. His solutions to a client’s distribution problems were so impressive that he was hired by the firm to implement them. With an expansion into Canada, the firm purchased one of the major trucking companies in Ontario and Ron decided to apply for the position of President and CEO. He was appointed to the position and after successfully turning the company around, he was transferred back to corporate headquarters to run the parent operation which was substantially larger. Since leaving there, he has held the position of CEO with two other firms in the trucking industry, and most recently has moved to the public sector as a CEO.

Home Environment

Born in the Mid-Western United States in the midst of the depression, Ron is the eldest of three children. His father emigrated from Germany around 1920 and although his mother was born in the United States, her parents were also German emigrants.

"My father was a carpenter when he lived in Germany," remarked Ron. "Although he was handy with wood, he didn't like the work. So when he arrived in the US, he worked in a foundry until somehow, he became a butcher. One of the interesting characteristics
about my dad was his determination to speak English fluently because he had to work across the counter. He would come home dead tired and sit and read the newspapers to try and improve his English and to educate himself. By the time he died, he didn't have much of an accent. He always worked hard and he set an example for me in that way, so that I didn't know any differently.

"He was also a real taskmaster. A while back I had a list of all the things I did to make money, from the time when I was about eight years of age to when I was twenty years old. I sold Christmas cards, mowed lawns, delivered newspapers, stocked grocery shelves, pumped gas, repaired cars and worked as a kitchen helper. And that isn't the whole list. I did whatever I had to do to keep making money in addition to doing chores around the house. Because our house wasn't that big, I also helped him build a garage and a room out back of it where I could study.

"On the other hand, my mother was softer, with interests more on the arts side of things. She loved music and enjoyed listening to a good orchestra, good singers and that sort of thing. And dad went along with it. My mother also enjoyed children and looked after young children in our home during the early days of childcare. With the state of her health, that's about all she could do.

"I think my parents were good role models and they provided a stable environment, although there wasn't a lot of free time. Sometimes as I'm pulling out of the driveway, I will remember how my dad, when he would pull out of the driveway, would always wave to my mom. They were an affectionate couple. I think I learned how to treat others from the way they treated one another. They were always nice to each other. As a family, we were always together and had good times."

Influence of Father

Ron spent many hours playing games with his father: "We'd have some wild games
of croquet in the backyard and we'd go out into the garage and play ping pong like crazy. We would also play the board game Sorry and that sort of thing. When I was at university and I came home, we would play pinochle and sometimes my mother would join us and we would play three-handed cut-throat. He really looked forward to those times when we would get together. He was very competitive and I think that's where I got some of my competitiveness, always wanting to be the best or do the best or whatever."

Childhood Moves

As a child, Ron moved several times. When he was about two years of age, his mother developed a bronchial condition and she moved to Arizona. A year later, he and his dad joined her: "Believe it or not, I remember parts of that trip with my dad. We drove out from Illinois and it was a great trip with him. I had been staying with my grandmother so I was really looking forward to seeing my mother."

Eight years later, the family moved again when his father went to help run his sister's business after her husband died. For three or four years, Ron's father worked as the purchasing agent in his sister's company until they had a falling out and he went back to being a butcher. Ron believes that the experience of his parents moving several times made it easier for him to pursue employment opportunities: "When I was living on the west coast and was asked by my employer to move to New Jersey, I saw it as an opportunity to emigrate myself. My parents had left their family roots to set out on their own and I suppose I felt there was some precedent there. That it would be OK for me to do that as well. Over the span of my career, I've moved over a dozen times."

Education

Ron described himself as being a relatively good student: "I was always near the top of my class and I got in with a crowd in school that were relatively smart. I won a couple
of medals including one for mathematics and I was in the top stream of kids, a lot of whom were being swept along into education. However, I had to fight my dad to go to high school and then I had to fight him to go to university. He didn't really want me to go. If I hadn't won a scholarship in a competition held by the local Catholic high school, I never would have gone. He didn't think education was that important, possibly because he only had grade four. But the interesting thing is that although he didn't support education, he wanted me to be the best and I was expected to study. If I got a B+, he would ask why it wasn't an A. Or if I got an A, how come it wasn't an A+. So I had that kind of pressure on me.

"And when I graduated from high school, I wanted to go to Cal-Tech in Pasadena California, which at that time was one of the top scientific schools. Although I was accepted, I couldn't go because I didn't have the money. So I went to junior college for a couple of years which allowed me to live at home and put some money aside so I could go to the University of California at Berkley, which was also a big attraction for me because it was a top-flight school. To pay for the tuition, I pumped gas and learned how to repair cars. And, because my background was in chemistry, I got a job in a chemical plant and worked swing and midnight shifts for two summers. It was only in my last year at university that I had to borrow a couple of hundred dollars from my mother, which I paid back. I almost got all the way through without having to get any money. That was good, but it was no big deal."

**Career Aspirations**

When he was quite young, Ron knew that he didn't want to follow in his father's footsteps: "At a very young age I helped out in a grocery store grinding hamburger, stacking wiener and hanging meat. I just didn't care for the blood and the guts. So I knew quite early on that I didn't want to be a butcher and that drove me a lot in terms of my habits
and those sorts of things.

"I wanted to be a scientist because science fascinated me and I am curious by nature. So when I got to university, I started off in chemical engineering. But when I found out what scientists really do, I didn't think it suited my personality and I switched to business administration. I became more interested in probabilities, the business of managing people, managing risk, and that sort of thing. So I started off in chemical engineering and ended up with business administration. That combination has served me well."

After being a CEO for a number of years, Ron began to explore the possibility of running his own company: "At one time, I looked at buying a trucking company. I put about sixty thousand dollars into buying it but I didn't like how it was going. So, I walked away from that deal. On another occasion, when I was between jobs and had been unemployed for a while, I began looking at buying a company that I could personally afford to control. It wouldn't have been something very big, maybe six million dollars revenue. And I found that I was nearly terrified of being a CEO of something that small after running organizations with budgets in the hundreds of millions and being in control of things that I couldn't see. I realized that I would be running this company and I would have to know things that in the past I had depended on other people to know. It was a significant insight for a CEO."

**Personal Characteristics**

**Interests and Hobbies**

Ron loves sports. However, his small stature prevented him from fully participating:

"If you can believe this looking at me today, I was a little squirt until I sprouted during my sophomore year in junior high. When I graduated from grade eight, I was either the smallest or the second smallest child in my class and I remember leading the parade of graduates. I also wore glasses, so I was somewhat limited in what I could do. I loved
baseball and football and was always sorry I couldn't be some kind of sports hero. But, my physical stature and having to wearing glasses kept me from doing that."

In addition to sports, Ron was interested in the arts: "When I was about eight, I got the bee in my bonnet that I wanted to learn to play the piano. But my father wouldn't pay for the lessons, so I used to do babysitting. In that way, I could do my homework while making a few bucks. I got to be pretty good. By the age of thirteen, I was playing difficult pieces like Chopin's Polonaise, Lecouna's Malagueña, and the Spanish favourite Andalucía. The principal at my high school was a great piano player himself and he talked me into playing in a concert in front of all the kids. I also played on the radio a few times and at church, where I also played the organ. But relatively speaking, my fingers were small and I really couldn't pursue that as a career. I guess I played until I was eighteen or nineteen and then I sort of packed it in when I went to university and there wasn't a piano available.

"I also enjoy reading. A lot a people kid me because I'm such a voracious reader. I read all kinds of books. Back when I was kid, I was fascinated with the war because World War II was on. So I would read all the books I could get about history, especially books about the army and navy. And I loved geography too."

Ron also has an interest in numbers and described himself as a measurement freak: 
"My wife always kids me about it. I'll go down the road and I'll count how many of this or that or something else. Even when I'm working out, I'm challenging the treadmill in terms of the number combinations that are coming up. As a child, it was always how fast, how far, how high. I guess that's the sports side of me. I was always trying to be a little bit better than my previous best and that sort of thing. That's been a great driver in my life."

Significant Accomplishment

Because of his fascination with numbers and the whole science of logistics, Ron decided to go into consulting: "Things just didn't move fast enough for me in the chemical
industry and everything had been done a hundred years before. So either, I had to go and run a big plant or I had to make a commitment to go into logistics and physical distribution. If I didn't run a plant fairly soon, I had no chance of advancing. And, advancement was important to me. So I answered an ad placed by a consulting firm involved in physical distribution and they hired me. My first assignment was to try and figure out how to move equipment for a household moving company, which had very little to do with my idea of what physical distribution was about. But as I got involved, I was intrigued with the thing and the next thing you know I had invented some process and techniques to solve logistical problems. In very short order, the consulting company recognized that maybe they could make some bucks off me by selling this to their clients.

"But it wasn't until two years later when they assigned me to a large chemical company that I finally got to physical distribution. In the meantime, I had concocted this thing that I did by hand on a small scale, which we then transferred to a computer for this client. It was the biggest job that this consulting company had ever sold in physical distribution. The contract was worth over $150,000 and in those days that was pretty big money."

Dislike of Consulting Work

Ron's decision to go into consulting work had a significant impact upon his career because the two years that he spent in this field convinced him that he didn't want to pursue a career as a consultant: "One of the reasons I disliked consulting was the lack of recognition for the effort and creativity that went into a study. There was one project where the client was charged fifty thousand dollars, which was a significant sum of money for a study back then. I gave a presentation and a fifty-page report was produced and distributed. At the end of it, this little seventy-five year old guy, who was the owner and grand patriarch of the company, popped up and said, 'Mr. Schultz, the report which you
have given us has cost us a thousand dollars a page!' What he didn't realize was the significance of what I had done and how much work I had put into it and hadn't charged him for. I work goofy hours, in the sense that it's just not nine to five. Since you can't shut off creativity, sometimes, I'll wake up in the middle of the night. I'll work and I'll make notes to myself because that's the only way I can get back to sleep. And he didn't realize that I never charged him for that time.

"I was also frustrated in this work because I couldn't get in and implement my recommendations. In others words, I had the feeling that I just didn't want to go through life putting reports on shelves with nothing happening with my ideas. It was really important that something happen with my conceptual approaches."

Although he didn't like being a consultant for these reasons, Ron did mention some positive benefits: "As a consultant, I learned the necessity of being extremely accurate in what I said. As well, I gained experience in presenting my ideas in a logical way in written reports and verbal presentations."

Significant Accomplishments

Another positive aspect of consulting work was the opportunity it gave Ron to demonstrate to others his astuteness in solving very complex logistical problems: "My last project involved getting a distribution network of seven hundred and fifty tractors, two thousand trailers and approximately fifteen hundred drivers humming right across the United States. I solved this problem by using computer technology and bringing into the trucking industry some of the first hub and spoke applications that the airlines were using.

"The old patriarch that ran the place was impressed with my recommendations and one day asked me to come down to his office. Up to this point, I had never been in one of their truck terminals. So we went out to the airport, got on his Lear Jet and we flew down to Ohio where he had the terminal manager pick us up. He turned me loose with the terminal
manager who showed me around. It was the god awfulest mess you'd ever want to see.

"About two hours later we were back on the Lear Jet and he was asking me, 'Do you think you can sort that out?' And then the next thing I knew, he was chasing me with a job offer. But he was a real tyrant and he had a reputation of being proud of the fact that he had twelve or fourteen vice-presidents that he had sloughed off. It appeared to be a good opportunity but I thought twice before I accepted his offer to become a Vice-President."

**Desire for Challenge**

When the firm acquired a trucking company in Canada, Ron was motivated to seek the position. One of the reasons was the challenge that the position presented: "I wanted the job for the challenge. Absolutely! All the experience I had in the trucking industry was in the area of line haul dispatch which was my speciality. But by then, I had also run the maintenance function for a year or so.

"But the environment I was leaving was also a factor. It was so untenable because I had risen so quickly. All my fellow officers in the company wanted to stick a knife in me. I wasn't part of the clique. The rest of the staff were also not very happy with me because the president went around telling staff to do what I told them to do or else they could check out. So, I had the choice of either leaving or becoming the CEO in Canada. And I thought it would be a hell of a challenge and fun to see what I could do with it. Why I had the gumption to think I could do it, I don't know. I guess I was really willing to work hard at the time and I certainly didn't want to be a failure."

Ron faced a number of challenges almost immediately: "I was awakened at three o'clock in the morning at the hotel where I was staying and asked if I would come down and talk to the workers who had just gone on strike. I remember going down to the waterfront which was shrouded in fog and thinking to myself, 'What the hell do I know?' Then the next night, it was the drivers. I was continually being tested right away. So I listened a lot and
tried to sort it out with common sense, probably a certain amount of what I call inspiration and perspiration, a certain amount of luck, and support from the old tyrant at the corporate office in the states. I remember he would get on the phone long distance and he would listen and grunt every once in a while and then he'd say, 'Are you going to talk about it or do something about it?'

"And, I guess my exterior demeanour is probably pretty severe in many respects. Until people get to know me, they don't see that I've got a big heart and I'll do anything to develop my people and bring them along. I think I have a way of getting along with people by listening to them, sorting things out, kidding them or whatever. When I started there, we had some pretty bad labour relations, but we were clicking along at the top of the heap when we finished there.

"It was also the beginning of a recession and business levels were dropping when I took over. I think we had about twenty-two hundred people on the payroll when I arrived and by the time I was done swinging the axe and working on things, I had taken about a thousand people off the payroll, which was a significant number of people. So that kept me pretty busy.

"Although I was initially apprehensive about my ability to carry out the responsibilities of a CEO due to my lack of experience, I didn't have time to be scared for very long because the profit motive to turn the company around was pretty strong. I think it is just sheer challenge that intrigues me. And I think that's why I've been so successful in terms of problem solving and the vision that I bring to my job and to this industry and the industries that I work in."

**Desire for Recognition**

When he does something well, Ron likes to be complimented: "I never got enough compliments from my dad and I think that this has stayed with me. I really appreciate it
when somebody says, 'Well, you've done a good job.' It means a lot to me. And I think because of what it means to me, I'm inclined to compliment others to a greater degree than I might have. Sometimes the recognition means as much as a raise."

Not only did Ron not receive recognition for a job well done by his father, but when Ron was in consulting, his superior exhibited some of the same traits as his father: "He was one of the reasons that I left consulting. He would promise the sun, the moon, the earth and the stars to the client but it always came out of my hide to try and deliver. I never knew whether he gave me enough credit for what I did."

**Motivation and Drive**

Ron believes that if you are going to be successful you must be motivated and have the drive to succeed: "I was just barely five years of age when I was in the first grade. My playmate down the street was just a little bit older and I asked my parents why I couldn't go to school. So, I started relatively young which meant that I was just sixteen when I got out of high school. At that point, I saw an ad in the paper for a kitchen helper at Sequoia National Park and I really wanted to go work there because I've a great love for the outdoors and I just love the mountains. However, my dad fought that in the worst way because I would be a couple of hundred miles from home. Somehow, I conned my mom into letting me go and then I lied about my age so I could work there.

"I'd work six days a week peeling potatoes, washing dishes, pots and pans. Then, I would have one day off. As soon as I got off work, I'd grab a flashlight, a can of peaches out of the pantry, get a blanket off my bedroll and off I would go. I'd hike as far as I could go and still come back the next day. I virtually did that all summer. When my dad picked me up, I was skinny. He was not happy. But, he got over it."

Working for incentives that are related to the degree of success he achieves is a great motivator for Ron: "One of the things I did when I first became a CEO was to
negotiate for a percentage of the profits as part of my compensation package. In fact, I did this every time I took a position in the private sector as a CEO because working for incentives really turns me on and I'd work my buns off. But in every instance, I was so successful in increasing the profits of the company that I made more than the person to whom I was reporting and they would take it away and replace it with things like stocks and cars."

**Thinking/working smart**

One of the keys to Ron's success is his willingness to learn: "When I became a CEO for the first time, I really didn't have anything in my bag of tricks. However one of the things I do, and have always done, is sort of drill down to bedrock on any subject or part of the organization I don't understand. And so over the years, I've learned things about marketing, accounting and the whole human resources thing. It's one of those things I've been meticulous about and I really feel that it is important to do this. If there's something I don't understand, I don't leave it to chance or baloney sling my way through it. I want to understand it so I know what kind of direction I'm giving.

"For example, coming to a public company like this was very difficult for me because I'm not political and that has caused me some trouble in my career in the past. I'm fairly straightforward in my approach to things. And it wasn't that important in some of the other things I did. But by drilling down to bedrock and learning as much as I could about politics and public relations, I've come to appreciate why public relations and corporate affairs is important and how it fits into the grand scheme of things.

"I think it goes back to my belief that you should do a good job, no matter what you are doing. Even if it's just pruning a rose, it's important that you learn how to do it and then you do it right. You don't just sort of hack away at it. And this attention to detail, in some ways, drives people crazy. But on the other side, I think it is an important part of why I'm
successful. Just talk to the guys here about budgets.

"When I first started, I would take millions out of the budget by what I call the ruler test, going line by line through the budget. Now, I might take a little bit out by challenging them on why they are spending the money, but it's that drilling down to bedrock and not taking things for granted that is really important. I don't have to do that as much today because they've learned."

**Visionary**

"People tell me that I'm quite a visionary. In my deliberations or when thinking things out, I have been ahead of my time more times than not. For example, in this business which is changing so dramatically, I couldn't stand the way things were and I knew that something had to be done. And I did something about it. We are now the leaders in the industry in terms of the best rates and reliability, lowest costs, and the best safety record. Currently, I'm submerged in new legislation and the changes around that. I'm in the process of making decisions on how to shape the industry in light of it. I've always enjoyed the role of being the visionary."

**Risk Taking and Challenging Authority**

Ron will take risks to challenge those in authority if he feels that what they are doing is wrong or unethical: One of the first instances occurred when he was a teenager and corporal punishment was a common method of discipline: "My dad used to use the strap on me—this abuse thing you hear about these days. I had my fair share of abuse until one day when I was fifteen, I grabbed him by his wrists and told him, 'Don't do that again!'

During his career, Ron has also challenged presidents of organizations for whom he has worked. Following his success in Canada and his subsequent transfer to the position of CEO of the parent organization, the company was taken over by a conglomerate. Shortly thereafter, Ron faced an ethical dilemma: "The company had run a significant bank debt
and this conglomerate had asked for a dividend in excess of earnings to support the activities of other companies. We were in a recession at that time, so the banks began questioning me as to when they were going to get their money back. Now, an old mentor of mine had taught me that you should always treat your banker with great respect and that sort of thing. So when the banks got more directive or more forceful in their questioning, it went against the principles of what I had been taught. But I carried it to an extreme and raised a rumpus with the holding company as to when the money was coming back. I wanted to be able to talk honestly with the bankers and be able to look them in the eye and tell them when the money was to be paid and so forth. Well, the holding company didn't like that. So they canned me and put in one of their fair-haired boys. I might handle it differently today but at the time, I wanted to be religious in paying back what we owed on the bank loans.

"There's an interesting story that comes out of that incident. Before I lost my job, I had sold my house in Toronto and bought a house in Michigan. But when I was fired, I gambled and bought another house in Toronto. The way the industry was going, I was not really eligible for a position as a CEO in another stateside company and I couldn't come back to the firm in Toronto because the conglomerate now owned it. So I made the decision to stay in Canada and I found an ad in a newspaper that had been placed by a headhunter out west. Fortunately, I got the job and we bought a house out there. So one weekend, I owned three houses. After living in the house in Toronto for six to eight weeks at the most, we packed everything up and moved. We even made some money on the deal because it was a hot market at that time."

Some years later, Ron became the CEO of a subsidiary company of a large multinational distribution organization. After building up the division to be profitable, he had a difference of opinion with the president of the parent organization on the company's
approach to changes in the trucking industry: "I was to be proven right. Within five years
the division was no longer profitable and the company went out of the trucking business.
However, I did find myself in a tough position because of my stance. I thought, I'd get
another job right away. But there was a problem and I didn't realize it at the time. I was at
the top of the biggest trucking organization in Canada and I was over qualified to run any
other trucking company, if that's what I was going to do. That was a hard time for me
because it took eighteen months of thrashing around and looking at situations before I
landed another position."

Handling Failure/Disappointment/Stress

One of the ways Ron handles disappointment and failure is to personally challenge
himself to bring a future success out of the failure. For example, in high school, he received
a low mark on an essay: "I had won a medal for being the best English student in the
eighth grade and then in my first year in high school, I got a D minus on my first essay. So I
said to myself, 'Well to hell with this, I'm going to see if I can get the medal by the time I am
a senior.' And I did."

Ron also finds that his spiritual values have helped him cope with disappointments:
"I had a pretty good religious upbringing in the sense that I had a strong belief in God and I
guess I got a lot of strength out of that. I would say that doing some praying and generally
trying to figure out that this situation will pass away or that disappointment will pass away
helps. It was a big disappointment when my wife and I found out that we couldn't have
children and so we decided to adopt some kids. Having gone through the business of
raising a family helps you understand other people's behaviour. So in that sense, those
things in your toolkit help you cope with your disappointments and those sorts of things.

"And my wife's been a great support in helping me deal with disappointments.
We've been married now for forty years and I can say that she's my best friend and a real
good lady. I'm the kind of guy who goes home and talks about what's going on. And she listens and is interested in what I'm doing. I think that's good for a CEO to have that kind of support. Some people would say bosh on that, it's not important. I know some of my friends don't tell their wives much of anything. But I get a lot of support from her to help me cope. And if I repeatedly talk about a particular person or problem, she challenges me by asking, 'Well when are you going to do something about it?' Instead of dragging our feet, we cope with problems with a spirit of 'we can do it'.

Ron also believes that it's better to focus on the positive than the negative. His current remuneration is a case in point: "One of the things that is a real problem is my salary. I should really be making half a million dollars a year. If I was working in the private sector, I would be making three times what I make here. I'm fantastically over qualified. But the way I look at it is I'm working and doing something that I kind of enjoy rather than sitting at home and feeling sorry for myself."

**Ron's Philosophy**

A small clipping that Ron keeps in his desk is really indicative of his personal philosophy: It was written by A. H. Charlton, who at the time was Vice-President of the Howe Sound Company and it reads, "I believe in the stuff I am handing out, in the firm I'm working for, and in my ability to get results...I believe in working, not weeping, in boosting, not knocking: and in the pleasure of my job...I believe that a man gets what he goes after, that one deed done today is worth two deeds done tomorrow, and that no man is down and out until he has lost faith in himself..."

**Balancing of Roles**

One of several things that have helped Ron maintain a balance between his personal and professional roles has been his marriage: "In the forty years we have been married, we have coped with uncertainty. My wife has been great in terms of moving..."
around, adapting to new environments, and those sorts of things. I think moving around has been a broadening experience for both of us. We have always taken an interest in the communities that we've lived in and we have a curiosity for travel. We've travelled to over seventy countries.

"And I think, one of the things that I've done is to try to be interested in what is going on around me. And that has provided a certain balance so that I didn't become so one-sided that I didn't have a balance on the world. I'm happy to be a Canadian today. As I've travelled around, I've discovered that I have a more global view or a broader perspective than some people I've met from the US."

Working out fairly regularly and maintaining a hobby farm provide a respite from his professional life: "I'll come home crippled up from doing things on the farm. But it's a good way to relax and get my mind on something other than solving business problems. I believe that you have to have some diversions. I'll work intensely for three months at a time and then I'll have to take a week off and sort of recharge the batteries. And that's become almost a mantra. I also insist that my people take time off to recharge their batteries. I think that it's important to have a balance."

Young Presidents Organization

One of the activities that Ron feels helped to put some balance in his life was his membership in the Young Presidents Organization (YPO), an organization that is dedicated to helping individuals to be better presidents through education. To become a member, one must be a president before the age of forty. Ron was thirty-two at the time he joined: "Belonging to this organization gave me exposure to entrepreneurs, professionals, and people who had inherited businesses. About a third of the members were in each of the categories. So you had quite a mix of people that you could listen to and be exposed to. Through those associations, I had a number of wonderful opportunities to keep some
balance in life and business.

"The organization would hold universities that would last a week at a time. My wife and I were able to go to these. Our first one was in Paris and it just blew us away. We've also been to Bangkok, China, Japan, to Vienna a couple of times, Munich, and the UK. We have attended these universities in settings that you couldn't imagine. And, the kind of resources the group was able to command were just wonderful.

"Then, there was the networking that went on, the ability to talk to people about common problems. It meant a lot to me. So, the couple of times when I lost my job as a CEO, it was important that I got another job as a CEO so that I could continue to qualify to be a member of the YPO. I set my sights pretty high so I wouldn't be disqualified.

"But at fifty, they don't think you are young anymore and they drum you out of there. So I put together a forum with a mixture of three different "cats," people from large, medium and small companies and we meet at least on a monthly basis. There is now a group of thirteen people and we are almost a personal board of directors in the sense that you can discuss any problems you are having, personal or business. Some people have gone through trials and tribulations like losing their jobs or having to sell their businesses. The group has bonded together in a very unique way."

Friendships

Ron also has a wide array of friends, some of whom he has known for a long time:

"My family would be my best friends, even though we are spread out, with most of them living in California. Then there is this group of thirteen I talked about. In some cases, we've been together for over fifteen years. A friend I met shortly after I came to Toronto would be my best friend here. And with all the moving we've done, it has not always been easy to form or retain long term relationships. But we haven't moved for eighteen years. I commute to and from here every day because I wanted to give my wife a little rest. I mean,
we've moved thirteen times. Enough is enough. One of the things we always did when we moved was to throw ourselves into the community rather than lamenting the fact that we had moved. That made moving easier. I still have friends in the trucking industry, people who used to work for me. And my wife and I have some friends that we met in a Sear's parking lot when we first moved to New Jersey. They moved out west but we still get together with them and correspond regularly."

**Career Development**

**Mentors**

Ron considers himself fortunate in the calibre of the mentors he has had during his career: "I have been lucky in the sense that almost everyone I have worked for I have respected and I could learn from them. When I obtained my first job out of university, my father-in-law took a great interest in what I did. And my manager at that time was an old plant superintendent and he and I would have debates about creativity and he would push and nudge me along. I also had the opportunity to work for a couple of hot shots out of New York who again were older. This gave me a chance to observe their moves and note what they did and didn't do as they went about their work.

"When I became a CEO, I was fortunate that my manager was also a good mentor. However, he was a real hard-nosed individual who motivated people by insults. In some ways, he was a really harsh taskmaster but he was somebody to talk to, bounce ideas off, and in a sense, to get some support. He continually showed that he had confidence in my ability to take whatever actions were necessary to solve a problem.

"So I've been fortunate in basically almost every case of having a fairly good mentor. Now I feel I want to put something back into the pot. So through the Young Entrepreneurial Organization, I'm currently mentoring a young lady who is thirty-two years old and has her
own business in logistics."

Feelings on Appointment

Ron felt both fortunate and humbled the first time he was appointed to the position of CEO: "The company was one of the top ten trucking companies in Ontario and at my age and with my background, I felt I didn't have much to offer. I was not well balanced in terms of knowing the whole ins and outs of running a company. I did have some limited experience in the company but it had been in distribution at that time. So, I was quite impressed. The other thing that struck me was that I was twenty and in some cases thirty years younger than most of the other CEOs. I realized that I was really the new kid on the block and I'd have to say, I was a little bit scared."

Luck

Ron doesn't attribute all his success in attaining the position of CEO to the personal attributes and skills he exhibits: "I was fortunate. There's a certain amount of luck in the sense that I was in the right place at the right time with the right goods. My boss needed someone to handle this bag of worms that he had bought and I was keen to do it and dumb enough to do it, to leave my native land so to speak with no prospect of necessarily returning. I think there is an element of luck in being a CEO to some degree. You know, you got the goods, you got the education or the skill set that the individual is looking for to fill the slot and if you are successful, there is no turning back."

One Regret

Although he has been a CEO, Ron regrets never having owned his own business: "If I have a disappointment at this point in my career, it's probably that I didn't have a background to run my own business. I'm entrepreneurial by nature but I have always been employed by an organization. I think some of my success is the kind of risk-taking I have been able to get away with while working for somebody."
Future aspirations

After he retires from his present position, one of Ron's aspirations is to do some consulting work. Although his earlier experiences in consulting were less than ideal, he would like to continue working: "In a couple of years I'll be sixty-five and I want to keep going in some way, maybe not full time, but in a capacity of providing some advice. I think the environment is right for doing that. I know I've got a different perspective on consulting now. As a matter of fact, since I was a consultant, I've actually run consulting divisions. I know what's involved. I think I can make a contribution and people will listen to me because I have something of value. Recently, a couple of guys wanted to interview me and pick my brains on something. I said, 'Give me five hundred dollars for an hour'. And they paid it because they respect or value what I have to say.

"Since that point in my career when I stood on the dock, and I was basically a youngster and didn't know anything about being a CEO, I've steadily become more confident and gained experience. I can draw on that experience bank at this stage as opposed to when I didn't have any. It amazes me today how some of these kids get out of school with MBAs and don't know their ass from third grade. And they go out and make a $100,000 or whatever giving advice as consultants. I put that down to analytical skills, a disciplined logical approach, good presentations, and so forth. So, I'm a natural if I choose to do it."
Andrea

"I've always worked at being the best. I think I can say authentically, more for the rewards of being the best than thinking I'm the best."

General Background

Andrea is President and CEO of a major hospital in Ontario and is extremely passionate about the work she does and the difference she is making in people's lives.

After graduating with a master's degree in nursing and working as a community health nurse for a year, Andrea was hired as a staff nurse in one of the largest hospitals in Ontario. A year later she resigned to take a front-line management position which she found to be very rewarding. During a maternity leave, she trained in ICU nursing and after practising and teaching in this area for two years, decided to take a full-time position in middle management. She progressively moved through a number of senior positions until becoming Vice-President of Patient Care at a hospital that was still under construction in one of Ontario's fastest growing communities. Upon the CEO's sudden resignation, Andrea was appointed to the position. After providing the leadership to build the reputation of the hospital to be one of Canada's most distinguished, she resigned to take up the challenges of being CEO of another of Ontario's premier hospitals.

Home Environment

Andrea was born in the early fifties and grew up in a very conservative environment. Her father was a manager in a large corporation and her mother stayed home and looked after the two children. Both parents worked in the same organization until they were married.

"That's how they met," remarked Andrea. "My mom loved to say that her job paid more than his did. But when they got married, he wouldn't let her work. It was way back
then. She had the kids and she didn't work until I was probably thirteen or fourteen years old when she became a supply teacher.

"And, my dad and his father worked for the same organization for their whole career. That's unusual eh. My father moved into management at a very early age. I have the Executive Desk Handbook that my grandfather gave him when he got that promotion. He was just twenty-two years old. So he was really young.

"I had a good relationship with my dad. He was a little bit distant but he played a lot of sports with me when I was growing up. Left a lot of the decision making to my mom and most of the discipline except when I really messed up. In the last decade of his life, he had a stroke. Physically it was difficult for him to get around and then eventually he had congestive heart failure and he was never himself again. I feel like I really didn't have him the last ten years he was alive, at a time in my life, when I would have gotten to know him a lot better in a different way.

"My home was one where I certainly never questioned that I was loved, very loved. They did a wonderful job with me. I have one sister who is eight years older. We're very different, VERY DIFFERENT. She's the more typical first child, I'm more the typical second child. And being eight years apart, I was always at an age that I was a real annoyance to her. She was the good girl. I was the bad girl. [laughs] She behaved and did what was expected of her. She never got caught smoking. She was very dependent on my mother and still is today. And I wasn't. And, that's probably a bit difficult for my mom. But, I'm very close to my family today.

"My mother would tell you that I was always a rebel. I was a real handful for her when I was a teenager. She is amazed that I turned out OK. My teenage years, particularly with my mom, were very difficult. We were always at each other. It was a Catholic home and she was very rigid. For example when I was in grades eight and nine, I couldn't go to
parties if boys were going to be there. I think my mom, in hindsight, thinks she might have been stricter than she needed to be, but she didn't know that at the time. It was a home where a kid's opinion was not very important. So you just didn't have much to say about anything at all. It's quite different than my daughters. Quite different."

**Education**

Despite getting easily bored in school, Andrea did exceptionally well for the most part: "I got very high marks until grade eleven. I skipped a grade in elementary school and won a scholarship to a private girl's high school because of my marks. I'd have to say I got a lot of attention by skipping a grade and getting high marks. People used to say, 'Oh she's going to be a leader' and I liked that. So, I would have to admit that I liked it and I seek it out now. However, in high school, I was pretty disruptive in class; I was a leader in a negative way. One of my teachers told me that I was a real leader but if I didn't get my act together I wouldn't go anywhere.

"After high school, I went on to complete an undergraduate degree. In the home I grew up, it was not negotiable whether or not I was going to university. I was going to university! At one point, I thought I wanted to be a doctor. Although I wasn't aggressively discouraged, my dad didn't really encourage me a whole lot either. It probably had to do with the generation at that time. Not a whole lot of women went into that and you needed very high marks. And in Grade 11 my marks dropped. I was having fun doing other things. So, I didn't have the marks and actually, I was very satisfied to study nursing.

"Back then, they didn't have community colleges. So, most women or young girls who studied nursing went to a school of nursing attached to a hospital and got a diploma. But I didn't want to miss out on university. All my friends were going. While there, I was very motivated by some of the teachers and I knew very early on that I wanted to go on and
do my masters degree in nursing.

"A health care organization gave me a bursary in my last year and it required that I
work for them. So when I graduated, I worked for a year as a community health nurse. I
got engaged and was married. My husband got a job in London, so I took advantage of
being in London and went to Western and did my master's degree. I guess they were pretty
impressed with my marks because they admitted me directly into the second year of the
masters program, which was pretty unusual. I don't think they would do that today. It
wouldn't be acceptable academically. But they did. So I did my masters in one year and
graduated at the age of twenty-three. There were very few women in Canada that had a
master's degree in nursing. Again, I stood out and I liked that. I don't mind admitting that.

The reason I did my masters was I thought I wanted to teach nursing in a university
setting. When I finished the degree, Western actually offered me a teaching position. But I
figured before I teach nursing I should probably work in a hospital since I had never done
that. My husband got a new job, we moved again, and I took a staff nurse position at a
large hospital. It was very unusual to be a staff nurse with a bachelor laureate, let alone a
masters and at a very young age."

Career Aspirations

Ever since Dr. Kildare was aired on television, Andrea knew that she wanted to work
in this type of environment. "Whatever it is I was going to do, it would be in a hospital where
all that drama was going on. I was so in awe of people who looked after sick people and I
wanted to be one of them. Even today, watching a program like ER gets me going. It gives
me juice and I love it. I ended up doing ICU nursing because of that whole adrenalin rush.

"And you would think I'm very far removed from it today and I am. But, I'm acutely
aware of what goes on here. I don't get to take part in it like I used to but I hear the code
blue that's called and I picture what's going on and I hear the stories of what happens here, who we saved and who we couldn't save. And quite literally, the miracles that happen here and the tragedies over which we have no control. I'm in this business because I could never be in the private sector working in a for-profit environment. I do what I do because it makes a difference for sick people. And that sounds very altruistic but that's what it is. That's why I love this job, not because of the title. I am not this job! It's what it allows me to do that I love. Because I can make more of a difference out of this office for patients than I even could at the bedside."

**Personal Characteristics**

**Interests and Hobbies**

As a child, Andrea's interests included playing the piano and participating in sports: "I went up to Grade 10 in piano and relatively speaking, for that day, I was pretty interested in sports. Certainly, not compared to kids today when my children are on provincial sports teams and that sort of thing. But back then, not a lot of girls were interested in sports.

"I was a fast runner and I was the anchor on my school's relay team. When I was in grades seven and eight, I started playing hockey with a couple of girl friends. Just pickup hockey. It wasn't organized. It was pretty out there. And I played a lot of baseball through school but they didn't have organized community teams when I was growing up like they do today. At least, not that I knew of."

Although Andrea does not consider herself a sports fan, sports still play a role in her life: "I watch sports on TV for inspiration but I don't know much about them. There is something about a team that's in the zone that's worth watching. It's magic! It's indescribable! There's a passage in Peter Senge's *The Fifth Discipline* where Bill Russell of the Boston Celtics talks about the experience when two basketball teams are in the zone—
how in actual fact, they are not competing. What they are really doing is driving each other to a higher level of perfection for those few minutes.

"I'm not a big football fan, but about two years ago, there was a football game I was watching. I think it was university teams and the team from Florida was the hot team at the time and they were in the finals. Just watching the game, you could see that something amazing was happening at a team level. That's the kind of thing I'm talking about."

Andrea's has two interests that reflect the values that she shares in common with her mother: "My mom will be eighty-nine this year and she is a voracious reader. You never see her without a book in her hands and two of her interests are leadership and excellence. Funny eh!

"I also enjoy reading. When I was quite young, I read fairly tales. Nancy Drew. The usuals. Nothing all that highly intellectual. Now I don't read a lot of fiction unless it's really spectacular like The Thornbirds or something like that. What I prefer is autobiographies, first person accounts of things. Right now, I'm reading Mia Farrow's book, What Falls Away. What an interesting life she had!

"I also read a lot of materials on management but not the traditional stuff. I'm a huge fan of Tom Peters. So I gobble up anything he says. And what's wonderful about him is that its not his doctrine. He just talks about what people are doing and how they are doing it. What attracts me is finding out what other leaders are doing, what is going to produce great results or has produced great results. I guess it fits with my personality."

Desire for Achievement and Accomplishment

Andrea does not like to be bored and she takes a proactive approach to alleviate it: "I ended up being very unhappy and very miserable in one of my jobs. I had been there five years and although I didn't start out that way, in the last couple of years I was really unhappy there. I couldn't easily move to another job. And when I did move, it had to be to
a position that I wanted. So what I did was to create something to keep me interested. It
was not something the hospital asked to be done or wanted to be done, but it was an
interest of mine and something I wished to pursue. And they kind of let me.

"What I did was to create a conceptual framework for nursing practices that I was
very interested in at the time. It's nothing I'd ever do now. But I did that very actively in
addition to my job. It kept me very busy and I was able to work with a broad, diverse group
of people that I had pulled together to do this. We met bi-weekly for two years and created
the framework. In some ways, working on this project helped me later in my career when I
moved to another hospital in a more senior position. But it wasn't in the obvious ways that
you may think. Rather, I learned how to deal with a situation where I was unhappy at work.
I created something else for myself to do so that I got to work with a group of people and
that sort of thing."

Facing Challenges/Handling Stress

Skills that helped prepare Andrea to attain and succeed in the role of a chief
executive officer were developed early in her career as a young nurse: "When you are a
nurse and a young nurse, new on the job, you are afraid almost all of the time because you
feel like you don't know what you're doing. So you ask a lot of people and you figure it out
and you make mistakes. After a couple of years, one of the ways I dealt with not being
comfortable with nursing was to take an intensive nursing course so that I would know
everything. And all that did was make me more nervous because then they put you into
ICU nursing and it's much more complex. That's kind of interesting in itself.

"And when I became responsible for six intensive care units. I learned a whole new
set of skills. It was a very stressful time because there was a shortage of nurses. It was
difficult trying to staff six intensive care units when there weren't enough nurses. I would
often go home with a headache and if I had trouble falling asleep, I would always read. So,
during this time, I developed incredible problem solving skills. And in difficult circumstances, you get very resourceful. Very resourceful. And this may be unfair and you might differ with me, but I think what distinguishes most women leaders from men is that they aren't afraid to ask others for suggestions or advice. I think men sort of believe that it makes a statement about themselves if they admit they don't know something. I'm a pretty good thinker. I'm a pretty logical thinker and when facing a problem, I just sit down and say to myself, 'What am I going to do and who can help me?''

**Courage and Risk-taking**

Being courageous enough to take risks, challenging the status quo and standing up for her convictions are hallmarks of Andrea's personality. One such project where she demonstrated these traits was the development of the conceptual framework for nursing practices referred to earlier.

"One of the risks of this project was the disapproval of my colleagues. And that's just what I got. It's a funny thing. They really had no interest in it. But I kept telling them that this was really important and they just sort of had the attitude, 'Let Andrea do her thing'. But then, when we completed our work and had an outcome, they turned around and blamed me for not telling them how important it was and including them. They were really angry, like REALLY ANGRY. It was quite astonishing. Everyone was trying to kill the leader. Put the work in the garbage can and start all over because they suddenly figured out it was important. So I took a stand. I got the brunt of their anger and it created quite a conflict but I was leaving soon, so it was no big deal. And coincidentally, it was at that time when I started leadership training through Landmark Education. And that is really where most of my courage comes from. But I didn't have the insight then that I do now to know the difference between taking a stand versus taking a position. That's something I learned through doing the work with Landmark."
This type of experience would prove useful in helping Andrea cope with the demands she would face as a CEO. Shortly after her appointment as CEO, construction on the facility suddenly stopped and she was faced with a difficult situation.

"Just as I took over, the contractor started construction on another large project and all the trades disappeared. And I had to get heavy with one of the largest construction companies in Canada. And you can image the big shots there. Little ole me who didn't know what I was doing had to say to them, 'Sorry boys, this is not on. You come back here and you finish this.' I found during the first year on that job, I was confronted daily and hourly with decisions that I had to make like that."

Several years later, her mettle again was tested as she began a new strategic planning process that involved a very substantial reorganization of the hospital's management structure and a formulation of a new mission statement.

"Both of these endeavours took significant courage and I think that's a part of it but that's not the whole of it. In the reorganization, people left the organization and most of these were in management. Now when you do a startup, it's almost transformational in terms of the experience. You really bond with a startup. You work eighteen-hour days for eighteen, twenty-four months. Weekends too. There's just no other way. And you go through a lot. And for the first and only time in your life, you have total organizational alignment because the goal is to open the hospital on time in a way that provides safety and good care for patients. So everybody's eye is on that goal. It's an extraordinary experience. Well, when you've got to reorganize and almost thirty of those people are going to have to leave and it was these same people that you really bonded with in the start-up process and a number of them are extraordinary people as human beings and people that you love, it's very difficult, very difficult.

"And then, there was no agreement on the mission statement. We had had a
planning process that was widely consultative but I drafted the mission statement myself with some inspiration from the writings of a very well known healthcare futurist. And there was no agreement. Like almost a thousand staff, no agreement. Three hundred medical staff, no agreement. Five hundred volunteers, no agreement. Twenty-two board members, no agreement. I took a stand. Dialogue went on for some time. There was what I call, the great hunt for another word. People had their dictionaries out and their thesauruses out for months. Like it was fine, go ahead, you are not going to find anything better, but if you do, so much the better. And within a couple of months, people reluctantly agreed that we'd try it. Within about eighteen months we had total organizational alignment, such that people used it to guide their decision making including the cashier in the restaurant, the guy who cleans the floor and the parking lot attendant. It was really extraordinary.

"Oh, and just before we launched into this mission where I got reluctant support, one of my assistants pulled me aside and said to me, 'Andrea, are you sure you want to do this? Some people consider you a lightweight in the industry.' And I knew that. It wasn't new to me. 'And you are a woman and you are a nurse and they are going to laugh at you.' And what was extraordinary, I didn't even have to stop and think about it. The words were right there. I said, 'I don't care. It doesn't matter. It doesn't matter because I'm committed.' It took courage but when you are clear about what your stand is, the courage is there, it's there!"

Divergent Thinking

Recognized in the field as a creative thinker, Andrea looks for things that inspire her and will make a difference: "I create a lot of chaos and I do a fair bit to destabilize the status quo. But I get bored very easily and I find most committee meetings and the work that committees do absolutely dreadful. It's so logical and analytical and it goes no where. I just don't have time for that. So I guess that's why I do what I do and besides it's much
more fun.

"For example, within a month of becoming CEO here, I began a significant reengineering project. It's not the typical kind of reengineering project that is done by the big consulting firms. Although I am using a consultant, I'm taking a very different approach. I got my inspiration from a book I read by Eliyahu Goldratt, titled *The Goal*. It's unusual for a business book because it is written in the form of a novel. The story revolves around producing widgets in a manufacturing plant and the author talks about such concepts as synchronous manufacturing and areas of constraint and capacity. Now, when you look at how a patient moves through a hospital, they move through it linearly like a manufacturing plant. So that's the approach we are taking and we are having wonderful success with it. It's disruptive and it's upsetting people. They are having to look at things that they haven't had to in years.

"There are a lot of people in my industry who think that in health care, you shouldn't do this. I disagree. You can destabilize lots in a hospital without putting patients at risk. It just takes the intent and the will and the commitment that the patients don't have to suffer. I became CEO here nine months ago and staff at my old hospital are hearing from people on the front line saying, 'My God, is she shaking this place up!' But I'm already freeing some highly talented people from the constraints that have been around here for quite a number of years and letting them make a difference as well.

"Again, the leadership training through Landmark Education is what really unleashed my creativity. Really accelerated it a great deal. It was probably always there but it was kind of constrained."

**Leadership**

The first time Andrea assumed a major role of leadership was during her last year at university when she initiated the plans to hold the annual conference of the Students'
Association at the university for the first time: "I chaired the whole event, created it and organized it. It was a great success."

Andrea believes that there are a number of attributes that contribute to one's success and effectiveness as a leader: "First, you have to inspire your people. There is a great quote from Charlotte Beers, Chairman and CEO of Ogilvie and Mather, and noted for turning the profitability of that company around. She said, 'So many CEOs are impeccably logical and I see the role as lifting people's hearts.' And that's exactly how I see it. I look at the people around me and if they are sort of dead and bored and boring, I look at myself and say, 'What kind of a leader am I being for them?' Secondly, SURROUND yourself with talent and DON'T accept mediocrity. It will pull you down."

**Maximizing One's Opportunities**

One of Andrea's attributes is the ability to maximize opportunities. When her husband secured employment in London, she took the opportunity to pursue a master's degree which she feels helped secure a position at a prestigious hospital. "I was about twenty-five years old and I applied for a head nurse position in ophthalmology at a large, well-known hospital and I got it. There were only a few nurses at that time who had that level of education and I'm sure they gave it to me just because I had a master's degree. There was no other reason for them to give me that job."

Similarly, upgrading her skills by taking training in critical care nursing led to securing a position in an intensive care unit and subsequent positions in management. Always vigilant for opportunities, Andrea saw a very small newspaper article indicating that a growing community in Ontario had just received approval to construct a new hospital.

"Somewhere along the line, in the early eighties, I saw a little, teeny, tiny article in the newspaper that said that approval had been given to a construct a new community hospital. And I cut it out and said to my husband, 'I want to be a vice-president of that..."
hospital. That 's my aspiration.' But I didn't get a chance to apply then because they never went to hire into that job for about another five years. So when they did, I applied for it and I got it. I went there as a Vice-President of Patient Care. For a year and a half while the hospital was under construction, I had a phenomenal opportunity to create a culture, to have an influence on the final details of the construction of the place, to be involved in hiring the kind of people I wanted and to provide the kind of care I wanted to provide."

And while in that position, Andrea made the most of the opportunities that either arose or she created: "There were two Vice-Presidents reporting to the CEO, the Vice-President of Finance who was the Chief Financial Officer (CFO) and myself. The CEO allowed me to attend the board meetings but he wouldn't allow his CFO to attend because he wanted to control the information that went to the board. And he thought I was pretty insignificant: 'You know, really, she's just the Vice-President of Patient Care.' And he thought I was kind of cute for the board members to look at. Really, he was one of the boys and he didn't think I would have much impact at the meetings. But for me, it was an opportunity to show the board members what I could do, what I was all about, and to show them that if the CEO ever should leave, they had somebody unique.

"And, I can honestly say that I never did that in an undermining way because I'm very ethical and I don't think I'm ethical because it's the good thing to do. I'm very ethical because I absolutely believe that any other practice other than that comes back and nips you in the bud.

"So, I made the decision that I wanted to impress them as somebody that could lead that hospital. That was probably a pretty significant decision. I was able to interact with board members and to attend the meetings and I created a couple of opportunities to do some pretty significant presentations, stuff that I knew they would really connect with. And they did. Not the usual patient care but stuff that brought in the private-sector. I showed
them how I wanted to structure my piece of the organization. And I just always tried to conduct myself like a CEO. Look like one, sound like one.

"And when the CEO left, a year before construction was finished, it was very unnerving for that board. What an awful, stupid time for a CEO to leave. It really left them hanging. They were nervous. And I think, if I was really honest, I'd have to say there was a piece for them in appointing me to the position. I was a known quantity and the only other option was to bring in a stranger. So I provided a certain level of comfort for them at a critical point in time."

Handling Disappointment and Failure

Even though she has had many successes, like all individuals, Andrea has experienced things that are disappointing or upsetting. Such experiences occurred when she was applying for several vice-president positions. Although she always made the short-list, someone else got the position.

"On one occasion, I was very, VERY disappointed. The location of the hospital was just up the street, my children were very young and it would have fit in very well with my lifestyle. But, I have always believed, in the long term, even with your biggest disappointments or upsets, you are better off for them. Something better will come. And look what came. And I'll say to friends who may have been fired from a job or are experiencing a difficult time, 'You know what. A year from now, you're going to be happy because you'll be doing something different with your life that you wouldn't have otherwise been doing.' And I really believe that.

"And if I'm in a dilemma or there is a problem at work or things are not going well, I think back to a previous situation that did not go well and I take a look at what I did to approach it. Often, one of my strategies is to retreat to my books and journals for inspiration. I get pumped by what I read. A journal that pumps me the most right now is a
new one called Fast Company. The whole issue of the current edition is fabulous but I always say the latest edition is great. And so I read and I think and I look for some inspiration and eventually, I just sit with it. If I'm upset or down about something, I don't try to fight it. I just stay in it. But I don't like to stay in it for very long—only long enough to sort out what I'm going to do."

Career Development

Mentors and Role Models

Andrea mentioned two people who were influential in her career in a positive way. The first was a university professor who taught two of the six courses she took in her master's degree program: "She was intellectual. She had an ability to be with people. She challenged you to be better than you would otherwise ever be. She was just this amazing, awesome person that I wanted to be like. Outspoken, intellectually challenging, and in the end, took a real stand for nursing and patient care. When I say intellectual, I guess what I mean was that she was smart in all sorts of ways, not just academically because I really don't value academics a whole lot."

The other person was a supervisor to whom Andrea reported early in her career: "For three years, I was in front line management and the first year and a half was hell for me. I didn't know how to manage people and the boss I had at the time was not a good mentor. She just supported anything and everything I did and I didn't know what I was doing. Then my bosses switched. And I got a boss who really knew how to develop me as a front-line manager. The last year and a half in that job was very rewarding and I felt that I did a good job. And I knew then that I wanted management. I figured that sometime later in my career I would teach."
Gender Issues

Andrea indicated that sometimes it is difficult to tell whether it's a gender issue or a working relationship issue when working in the medical field: "It's a funny thing when you are a woman and a nurse because you can never figure out what the issue is, whether its that you're a woman or that its you're a nurse. And there is a distinction there. So I would have to say throughout my career, when you're working with physicians, not with all, but with a lot of them, there's an issue there where they are smarter and more important than you are. Part of it is gender and part of it is the position. At that time, I was rather confrontational with them when I faced these issues. I didn't have the really sophisticated relationship skills that I have now. I wasn't looking for a fight but I wasn't going to let them get away with anything either. So, I would take my stand on certain issues and it wasn't always that effective."

When Andrea got her first summer job, her father spoke fifteen words that have had a significant impact upon the way she looks at gender issues. Those words were, "Andrea, you always have to be that one employee that they can not do without."

"So, you hear a lot of women talk about the glass ceiling and about how women have to work harder than men to get where they want to get and that sort of thing. That's maybe true. That's probably true. But it means nothing to me because whether I was a man or a woman, I would never forget my father's words. For some reason, they stuck. I mean he told me a lot of things, not a lot stuck, but that stuck. I've always worked at being the best. I think I can say authentically, more for the rewards of being the best than thinking I'm the best. And so I never get caught up in thinking that I have to work harder because I'm a woman. Doesn't matter. I'm going to work the hardest and do the best that I can, no matter what. So I don't get caught up in thinking about it. For me, it's just not a big issue in my life."
Although the glass ceiling was not an issue for Andrea, she has experienced sex role stereotyping on a number of occasions. As noted earlier, Andrea turned one such situation into an opportunity to advance her career and on another occasion she made it clear that it didn’t matter how she was perceived, she was committed to seeing the issue through. A similar situation involving sex-stereotyping occurred fairly recently: "I hired this consultant and he is making a lot of changes and they are not necessarily coming from me. I heard that one of the key physicians said in a public meeting that the current leadership of the organization is a bit fuzzy between the CEO and the consultant. And I thought about that a lot. You know, my predecessor was male, about six foot one, forties, lucid, looks the executive. This consultant’s wife is also a very, very, credible consultant but she’s a cute little blonde and I thought to myself. If my predecessor was still here, and he was doing what I am doing and the consultant was this cute little blonde—you get the visual—do you think that he would be saying that the leadership was fuzzy between the CEO and the consultant? No. Definitely not! And it’s annoying. But I don’t let it stop me and I don’t dwell on it. And I certainly am not going to go out and say ‘You are going to know who is the leader, who’s running this place.’ There is no question in my mind that I am and that’s all that matters.”

Role Conflict

Balancing roles while working full time was occasionally problematic for Andrea: “At times, you have to be prepared to work long hours. There was a period of time, and I couldn’t admit it at the time, but in hindsight, I would have to admit it, and I hate to say this, but my work was more important than my family. And you feel torn between being at home and being somewhere else that you need to be. It’s very difficult striking the right balance with your children and I think my youngest daughter has suffered and I hope some day that she will put it in perspective. When you are constructing and opening a new hospital, you’re
not talking twelve and fifteen hour days. You are talking eighteen-hour days for a minimum of a year and a half. There is just no other way of building and opening a new hospital. But you don't have to do this forever. Sure I'm a CEO now and CEOs work long hours but you know CEOs have a good deal of control over their hours too and I exercise that control. I am not a type A, absolutely not! I could sit on a couch all weekend and not get the least bit stressed, even knowing I have work to do. I can go back to work Monday morning without ever having opened my briefcase. I've a pretty good sense when I need to veg out, when it's not getting me anywhere to be in my briefcase."

Feelings on Appointment

"I never aspired to become a CEO. Even as a vice-president, I didn't want the position. I thought it was too difficult a job. You have to please too many people: hospital staff, medical staff, patients, families, and the community. I didn't want it. But as a VP, I worked closely with the CEO. I got to watch him while he was doing his job and I thought, 'Hmmm. I can do AS good a job and I think I can do a better job.' Pretty preposterous of me. So, I just watched him and thought to myself, 'I could do this. I could do this!' So when the CEO suddenly resigned, I knew I wanted the job. And when the board came to me and asked me to take the job, I accepted and have never looked back. I was scared to death because there was NOTHING in my background that would have predicted that I would become the CEO. I had never even been a vice-president in an operating hospital and this hospital was still under construction. I often say to people, 'When I was a little girl, I never played with dump trucks and cranes. When I became CEO, we had cranes outside and I didn't even know what they were and there were over 200 trades on site.'

"But when I was appointed I thought, 'Wow, oh, my God, this is amazing, REALLY amazing. I just wish my dad and my father-in law were alive to see this.' I felt it was a great accomplishment. I was absolutely thrilled."
Future Aspirations

Andrea would like to continue to make a difference in people's lives: "I've been in adult care all of my life and I love it. But I think because I am a mother, the ultimate inspiration would be to make a difference in the lives of children who are sick. So I would like to take what I am doing, in terms of making a difference, and do it in a children's hospital. And maybe at some point, just around retirement, I'll get back to teaching. I've done a lot of public speaking. In fact I still do and I consider that teaching because I believe teaching is inspiring and motivating others. So, I'm out there speaking to hundreds and hundreds of people, talking about the things I have accomplished and shaking them up about their readiness for change and yes, changing for change sake. People say you shouldn't, well I say you should. So, I think I might like to teach."
Dan

"I've always wanted to run a railroad because I've always been a rail fan. So, when people would ask me what I wanted to be when I grew up, I would say a president of a railroad."

General Background

Dan has always worked for organizations involved in the transportation industry. Upon graduation from Harvard, he secured his first position with one of the many railroad companies in the United States at that time. Three years later, he was fired over a disagreement on a management issue. Knowing that another railroad was looking for people, Dan contacted someone he knew within that organization and was hired. However, this organization subsequently merged with another large railroad. "It was a disaster, so I quit," Dan remarked. A friend introduced him to the president of another privately-owned railroad and he was hired to fill a vacancy in the budget department. He was then recruited from that organization to run the commuter rail division of a large transportation system. A freak accident in another division resulted in a desperate search to get someone to run it and Dan was chosen. After rebuilding maintenance and budgetary controls, he was promoted to a high profile position. However, a political change precipitated Dan's decision to leave the organization. The position of CEO in another large organization within the transportation industry became vacant and he was recruited and hired. Since then, Dan has been CEO of several organizations in the United States and Canada.

Home Environment

Dan was born in the Eastern United States in the midst of the depression into what he labelled as a very traditional family. His father worked as a broker in a large New England investment house and his mother stayed home and looked after the two children. Although both his parents were born in the United States, all his grandparents were Eastern
Canadians. Dan described the family as being very close: "We did everything together. When my parents went on a vacation, we always went with them. I never had any worry about not having a home, support and those kinds of issues. The ethic in the family was very much dominated by our roots.

"As a family, we were always comfortable. But, my father's family and my grandfather's family, they were poor, which is not unusual for those living in Eastern Canada. Almost everybody was poor. My father would tell us stories how they'd be sitting in the house and would run out of gas and wouldn't even have a quarter to put into the meter. That's how poor they were.

"Like a lot of Maritime families, we kept very close ties with our relatives in Canada. So, I spent my summers in Eastern Canada and from the age of ten or twelve, I worked on my uncle's farm. As I got older, I worked a few summers as a messenger for a local brokerage firm. The pay was a dollar an hour."

**Education**

Dan attended local public schools until his final two years of high school when his parents sent him to a private school. He recalled that he always stood in the top quarter or third of his class.

"Education was one of the things my mother and especially my father worshipped. And he really had none. At most, he had eighth grade. But it's more likely, he didn't even have that. One of the things he wanted to do as a parent was to do everything possible so that his children were educated. So, I was sent to a rather prestigious private school. I went there for two years and then went on to Harvard where I got my BA. Upon graduation, I served in the Navy for three years and then returned to Harvard and did my MBA."

**Significance of Education**

Dan believes obtaining his MBA had a significant impact upon his career: "I think
that the way I think and the way I approach problems and my management philosophy is a product of the training I received there. The approach of the Harvard Business School was very much a hands on approach and I had a couple of instructors who were real proponents of an inclusive style of management. What they reinforced was a sort of natural tendency that I had.

"School was important, but I don't want to give the impression that if you have a sheepskin from a school like Harvard, you'll become a CEO. What it will do is get you in the door so people will talk to you. I think my success can be attributed to the training I received at Harvard coupled with family values, self discipline, my attitude to work, getting people to buy into whatever it is I wanted to do, and luck."

**Career Aspirations**

"I've always been a rail fan. When people would ask me what I wanted to be when I grew up, I would say a president of a railroad. So, I knew what industry I wanted to work in but I never had a game plan. I've never known where my next job would be. I've always had the philosophy, 'Pay attention to the job you're in'. There's only been once when I left a position and knew where my next job was. I usually say, 'For whatever reason, this job is over. I've done what I can do. It's time to leave.' And I leave. And then I say, 'What am I going to do?""

**Personal Characteristics**

**Interests and Hobbies**

As a child, Dan spent his summers on the East Coast in Canada. He has always enjoyed being outdoors and he likes the woods. Cycling, walking, backpacking, hiking, fishing and camping have been among his interests.

"I was a normal kid. I came home from school, rode my bike. I had a lot of close
friends with whom I'd pal around playing baseball and going biking. I wasn't terribly good at athletics but I liked hiking. For a time, I used to collect stamps. But I haven't worked on it for years.

"Sometimes, I'd read a mystery or a novel. But generally speaking, I'm not an avid reader. I'm reading The Cost of Good Intentions now. It's the history of New York City. If you read it, it's the script for what's happening here. That's why I'm reading it. It's amazing! It's the same thing. Now my mother is an avid reader to this day. She's ninety-three and she reads a book a day. I mean if you'd see her house, she's got two thousand books."

As long as he can remember, Dan has been interested in railroads, buses and ships:

"As a kid, I had a model railroad. But I wasn't an aficionado like some guys. I never finished my layout. I got it set up so that the trains would run around but I never added the scenic elements like the trees and the mountains. In fact, I've still got it packed in boxes. And, I've always liked the sound and the smell of trains. I enjoy them. I like to be around them. I also like the kind of people that work in the business. They are service-oriented people. They know they have to come to work. They know that being on time is important. I like that and I like people like that."

Need for Accomplishment

Part of Dan's work ethic is to be involved in useful work. What he finds intolerable is to be doing nothing: "I believe all work is honourable. So, it doesn't matter if I'm digging a ditch or sitting here. What's dishonourable is doing nothing and I feel guilty if I'm not doing something useful. It really goes back to the values I learned from my family which were strongly influenced by the Puritan work ethic—if you don't work, you're evil or bad.

"I remember when I was living at home, I had a cousin who lost his job. It was a good job and he was young at the time. Six months later, he and his wife came to our home for dinner. When my father shook hands with him, he noticed that his hands were all
callused and asked him what he had been doing. It turned out that he had literally been
digging ditches for six months. But that was good. I mean, that would not be held against
you. That would be a good mark in the values they held.

"And my father was an example to me. He always worked extremely hard. Although
he had no education and his family was really poor, he became a very successful man. He
started his career as a messenger of a brokerage house and rose to the level of principal
partner. If I look at my career, a lot of my success is due to working hard, paying attention
and committing myself to whatever it is I am working on. They are the same things my
father and my relatives did. In fact, I left one position because it was so unpleasant. I mean
I just left! I was sitting there collecting a pay cheque and not doing anything. I said, 'This is
nuts. I need to get another job.' I'd never been to Europe. So I quit and I went there."

**Taking Responsibility**

When Dan enlisted in the Navy and was put through the rigours of training at the
Officer Candidate School, he didn't realize how extremely useful these experiences would
be.

"I know this sounds sort of funny but at that point in your life, the armed services
provides a real sense of discipline and limits. You know what you can and what you can't
do. And there were a number of things that they beat into you. If I had to pick one thing I
learned there, it's that you accept responsibility for your actions. I'll give you an example. I
still remember it because of the way it happened.

"We were in companies of about thirty people each and you had your barracks that
you were in. And everywhere you went, you marched! And if you got a violation of some
kind, like a uniform violation or your bed wasn't made right, or whatever, you got gigs. And
if you got so many gigs, instead of going on leave on the weekend, you ended up marching.
Well, I figured out right away, this meant keep your locker clean, make your bed really tight,
hospital corners. Put a dime on it, it had to bounce. Shoes had to be shiny and your uniform clean. Everything had to be in ship shape including about thirty books that had to be kept in sequence according to size.

"Now several of these books were about the same size and guys would deliberately flip these around on you. But the old chiefs could quickly spot they were out of order because they were different colours. So, guys would get caught because their books weren't in the right order and they'd have to march. Well, how unreasonable! Blah blah blah. And you'd watch this and I can remember thinking, 'Well, they knew, THEY KNEW if they got caught, they'd have to march. So why did they do it?'

"Now one day I'm out marching and I mean I was perfect—I always kept my books in order and I followed all the other regulations. Almost everybody else in the company had had to march except me. And the guys were really sort of getting pissed off with me. So anyway, we're marching along and this chief stops the column and orders me out of ranks. Everybody else has a big smile on their face. They figure, ah ha, he finally got it! The chief comes up and he looks at me and says, 'You've got Irish pennants on your books.' Now, these books had been used and used and used so the bindings were all tattered. Well, this was a new rule. He said, 'Look, you got those Irish pennants on your books.'

"I took a look and I said, 'My God, I do!' And he said, 'What have you got to say for yourself.' And I said, 'Well, I'm very sorry it happened and it will not happen again and its my fault.'

"Then he said, 'I'll let you off with a warning'. And you could hear an audible "Wow" from the other guys. The point is, he was trying to nail me on something. He got me. He finally had to fabricate something. But the whole message was, just accept it, don't fight it, it's a mistake, come clean.

"When I became an officer, I was also accountable for the people assigned to me.
One of the primary responsibilities was to look after the welfare of the people that you were supervising. So, it was very basic management training. But it was good. And I think, if anything, the self-discipline I learned through those experience was really, really good.

**Ethics and Values**

Dan's ethical standards are very high and are rooted in the Protestant ethics and values that were espoused and modelled by his parents and grandparents: "My maternal grandfather was a Newfoundlander. When he moved to the states, he came with nothing. He went through a number of businesses and got his own steamship company, actually owned the ships. He was the captain and a real salt-water sailor. I mean, he was a classic when you think of a Newfoundlander. And I reflect that. I know I do. It's just the way I am. I'm not going to screw around with anyone on management principles. I'm very inflexible, extremely inflexible. There's no point. If it's the slightest bit sleazy, I just won't deal with it. It borders on the puritanical, I think. But I'll tell you, it stands you in good stead in these jobs. One of the things that happens to a lot of my compatriots in this business is that they get a little bit pregnant on something and try to bend the procurement process here or there. I think it stinks, really. I'm not going to do it. I refuse to do it. And I'm really public about it. You are only going to perform if you're happy and if you are basing your actions on principles."

Dan's values were also supported and reinforced by the teachings of the church he attended: "Up until I was about twelve years of age, I went to Sunday School on a weekly basis. There I learned that I had a responsibility to others and that certain actions were wrong. For example, stealing is wrong. So is telling lies. I'm not overly religious but I believe those values influence how I act today and I'm still active in the church back home."

On at least two occasions, Dan has terminated his employment because the ethical standards of people within the corporation or on its boards did not meet his moral ideals:
"In one of the organizations, it was very clear that this guy was a sleaze. So, I quit. I wasn't going to hang around. On another occasion, I had fulfilled my contract but I announced I wouldn't renew it because there were a couple of board members who were what I would call borderline sleaze. So, I left.

"If you get a senior position and say 'This is the best job. I've got to hold onto it no matter what,' you're in for big trouble. BIG TROUBLE, I think. Unless you don't care, you are going to be put into compromising positions. Whoever you are working for, you try to do the right thing. I mean, you DO the right thing. Now if you are wrong, somebody may convince you that you're wrong. I'm not always right. Okay, fine. But, if you are forced to do something you think is unethical, you don't do it. You just don't do it. A lot of times people will try to hide things and in the public sector you can bullshit them. But you always get caught if you do that. It's much better to be upfront. If you got a problem, here's the problem, here's the solution, here's what we're going to do."

Self-Confidence

Self-confidence is now one of Dan's strengths, although it wasn't always so: "I think it builds. I was not an unusually confident person when I started out, but I didn't have a lot of self-doubt either. When I was Director of Operations and I had five thousand of the six thousand employees in the organization working for me, I had the fleeting thought that 'Boy, this is a big! I wonder how it's going to work out.' But I didn't dwell on it because in these jobs, particularly when you first start out in any of them, there is so much going on.

"But I have changed. You develop a certain amount of confidence. You learn from experience. I probably tolerate less than I used to. I mean I never was good at putting up with fools but I'm much quicker now to come to a conclusion that this isn't going to work, or you're doing something wrong and you better straighten it out. And to be direct about it. Twenty-five years ago, if I had a problem with somebody, I'd have agonized more about it."
Whereas now, I tend to be pretty quick to say, 'Look, shape up or ship out'.

"And thirty years ago, if you would have said I was going to have to get up in front of a thousand people and give a talk with twenty minutes notice, I would have said, 'No way.' Now, I say, 'What do you want me to talk about? Give me ten minutes. I'll make some notes.' I'm enough of a ham that I can get up and do it. Doesn't bother me. So, you change as you go along."

Risk-Taking

"Failure is always a possibility," remarked Dan. "There is an enormous amount of risk associated with taking senior positions in this business. I tend to get hired when the place tends to be in real trouble. I've never been hired into a place that was a smooth operation. Now, everyone thought this was a smooth operation but it wasn't. It was obvious to me they had all kinds of problems. The reason I got hired was the thing was starting to go down. In this business, becoming CEO is so fraught with danger and unknowns that it's not like you've grabbed the brass ring. It's a different attitude because it's a very high risk environment.

"I remember agonizing over whether I wanted to become CEO of the largest corporation in this business in North America. And I was back home at my mother's home at the time. My father was dead by that point and my mother would have been in her eighties. I remember we were sitting at the kitchen table and I was saying to her, 'I'm happy where I am. I won't be getting much more money. It's not like I'm going to double my salary. They are having a lot of problems, blah blah blah, and I'm not going to do it'.

"Now my mother is really funny. She said, 'I'll tell you why you're not taking the job. You are goddam afraid of it. People will think you are a coward if you don't take that job. And if you don't take it, you won't be able to live with yourself. And besides, you'll regret it because you'll never get another chance at that, especially to work with somebody you like.'
"I thought, 'Oh God!' And I said, 'All right, I'll take that job.' I swear, it was that simple. She shamed me into it. And I called up the guy and I went in to see him the next day and I remember telling him, 'My mother's making me take that job.' And at this point, as Dan finished the story, he chuckled.

**Thinking/Working Smart**

Dan believes that central to one's success are the methods and the personal demeanour that one brings to the job: "What's relevant is the techniques and the attitude you have—the way you manage, your style. And that doesn't change. I'm convinced that once you pass a certain point in your life, you are sort of moulded. You're not going to change a lot, whether it's the style of your management or the techniques and tools you use to get the job done. And I think it's quite early in one's career when that occurs. When I look back, the way I approached the job when I first became a CEO is very similar to what I do now. I can do it a lot quicker now because I can say, 'I want this organization chart, or this budget system'. But, I had the rudimentary tools then. I just got better and have refined how I use the tools and now I've got a standard approach. When you're dealing with fifty thousand employees, you better have some techniques."

One of the elements that Dan feels that you must be able to handle in this type of business is the political situation: "The nature of this business is risky because the political dynamics are very difficult to predict and things change. People get elected, they die, they lose the next election and they're gone. These organizations generally have these highly political boards who are not noted for being good managers. That's why the business is in so much trouble. So, you can take a job with a known set of imperatives and it can all change. You can begin by having a group of people that want to rebuild the physical plant, restore the service and clean up the graffiti, those kinds of things. And two years later, you got a group of people who don't give a shit about maintenance or about the service. They
want the contracts. They want this or that. So it's a very dynamic situation, whereas in a private company, you still have the politics, but generally speaking the goal remains the bottom line."

To ensure that he can accomplish what he needs to do, Dan will set out conditions under which he will accept a position: "In my first job as a CEO, the first task was to get the general manager the authority to hire his own staff. So, the chairman and I agreed that had to be done or we would die trying. And we did it. It took three months and it created a big flap. There was a big explosion of the board. They wouldn't let me hire somebody. All the newspapers were outraged. And you know, we won.

"On another occasion, I had figured out what I wanted to do if I accepted the position. I knew from a management standpoint that the place was just a mess. It was a disaster! So I talked to the people I wanted to take with me and got their agreement to come. Then I told the chairman, 'If I agree to take the position, you are going to announce me and then I am going to announce them, like the next second.' And I did. I had a little argument over it, but he did it. And after I had been there and the thing was running really well and I was clearly accepted and everything, somebody said to me, "You know, presidents of this organization were viewed as expendable. They came and went, came and went, and the organization went on and never changed. When you were appointed, it was the first time that the old mossbacks actually were worried. They knew this time it was going to be different.'

"Because the organization tends to be in desperate trouble when I get hired, I tell the board, 'I am not a warm fuzzy person. If you don't like it, then don't hire me.' I don't sit there and tell them, 'I'm so happy you are considering me. I'll do the best I can.' No, I tell them, 'I know the business and I know what has to be done. I have enough confidence I can do this and this is what I'm going to do. If you don't like it, don't hire me."


Respect for People

"To be successful, you have to be able to build relationships. When you talk with CEOs about their careers, a lot of it will be very egocentric. You have to have an ego to be in these jobs. There is no question about it. But, the key to success is to get other people to buy into it what you want to do, in this kind of business anyway.

"Where I come from, it was a very egalitarian society. And though this may be a very simplistic view, there were two classes of people. Those that work and those who don't work. And if you worked, you didn't view relationships in the workplace as hierarchical. So there wasn't the tendency to denigrate other people's work. It was more of a team effort. Whereas, in Vancouver, Toronto, Montreal and other big cities, you tend to have a very hierarchical society. That is, if you attend Upper Canada College or some other prestigious institution, you just sort of assume you are going to be in a leadership role. And, that's also true in the US. You've got the same thing. Now, I went to Harvard and then I went to Andover. But I think, by the time I went there, my values had already been formed.

"I mean, if you look at my father. He was very successful. He was a member of the New York Stock Exchange and the Boston Stock Exchange and other prestigious organizations. Yet, he didn't have the slightest instinct in him to be a social climber. So, I think that sort of influenced me. Because all I care about is that the people I'm with, I enjoy being with. I don't care who the hell they are. So, in this job and any of the previous ones I've held, I haven't tried to break into any social setting outside of the people I work with. Any people I've associated with or with whom I've socialized, it's been strictly because I liked them. I don't seek out invitations to parties and that kind of thing. Matter of fact, I hate to go to them. After work, I don't. By the end of the day, I just want to crash.

"And I realize, my point of view is very different from a guy working as a janitor or a mechanic in the shop. I have different things to worry about. But it means I have respect
for what they do. And I think they know that and that means a lot in this business. When people come to work, it's important that they have a feeling they are part of something and what they're doing makes sense to them, even though they may not understand it all. So, I go down and talk to them. But I don't do that because it's a conscious strategy. It's just the way I was brought up."

Handling Successes

Successes for Dan are times to celebrate with others: "We are a pretty small tight-knit group. We all meet in the morning, generally speaking. Everybody comes in and we sit down, have coffee. We eat together in the little dining room back there, make our own sandwiches and that kind of thing. So when something good happens, we usually celebrate it together. Recently we got approval to spend a very large sum of money. It was something we all worked on together. So when it happened, we all sort of sat around in here and the other offices and celebrated. These things are all a team effort. I know I have to provide guidance and leadership. I've got a role, but it's not my victory, it's ours."

Handling Failure and Disappointments

When things don't go well, Dan moves on. The one thing he doesn't do is dwell on it: "When I was fired from my first position I said to myself, 'What the heck do I do now?' I knew some people who worked for another organization in the industry. I knew they were looking for people so I just called up somebody I knew and I got hired. When I got canned, it was sort of sad but it wasn't an acrimonious sort of thing. We had a disagreement about an issue. In retrospect, I was really right. What they were doing turned out to be wrong and it hurt the company tremendously. But you know, when things don't work out, I just move on. I joke about it but I've always had my "go to hell" money. I'm pretty frugal the way I live and the jobs pay pretty well. So, I've always saved my money. I've always been in a position that if I didn't like what I was doing, I'm was out of there. And by the way, if you are
looking at CEO type jobs, you've got to be prepared to do that."

**Handling Stress**

Because the positions he has held are very public oriented, Dan tends to feel that he is working all the time: "You worry about the place. You get the big bucks so to speak but there's a lot of responsibility that goes with that in terms of commitment to the organization and caring about it. And it takes a lot out of you. Things can go wrong at any second. Something can go wrong and people can get killed. So generally, when I'm in town, I don't care where I am, I am working. The only time I don't feel like I'm working is when I get on an airplane and head home or go hiking in the Eastern United States. And getting away from it is something you have to do. The stress is extreme. The job is very demanding. The first year is terrible. It's very hard. Sometimes, you don't sleep that well because you know things are bad. And if you don't know things are bad, you shouldn't be in the job. But my way to deal with it is to get the thing fixed. Fix the physical plant and equipment. Get the training squared away so the place runs."

**Career Development**

**Mentors**

"I wouldn't say there was a specific person who was a mentor in the usual sense of the word but there were a whole series of people that have shaped me: my parents, grandparents, and people with whom I've worked. And I've worked for some pretty fine people. One was a president of one of the railroads that I worked for early in my career. He was a really fine man and a good man. He had a lot of courage and he had a very nice manner with people. Another person who influenced me, although I didn't report directly to him, was a treasurer. He was the funniest guy. It wasn't so much his style but some of the tools that he used to manage that were helpful. And when I was Head of Operations, I
worked for a guy who later became Chairman. He was a real gentleman and had a big influence on me because it was while working with him that I got my first experience of managing in the public sector. From him I learned to be extremely open. And it has worked for me and stood me in good stead. Whatever you want to know about the place, there it is: how many people, who it is, what dollars, what projects, anything, it's all there. That was his style."

On Establishing a Reputation

"One of the problems of coming out of a business school is that you are trained to be the CEO but you don't get hired at that level. You have to start off doing useful work at a lower level and so you have to make a decision early in your career as to what you are going to be doing for the first ten years of your life. In this business, it could be working on car maintenance, track maintenance, transportation or scheduling. When I got out of school, the organization that hired me didn't have a clue as to what they wanted to use me for. What they wanted, they thought, was someone with an MBA. So I got hired to work in a group who were doing merger studies, financial type activities. Then I got moved into a marketing department when they set one up and then I got involved in an early battle over containerization and I got fired.

"But I like to think I did a good job wherever I was. I've always paid attention to the job I'm in. A lot of one's success is a combination of events and the people whom you get to know in various jobs. It's about establishing a reputation. And having a good reputation in this field is important because this is a small industry, big in terms of dollars and everything, but its sort of a world unto itself, if you will. We all know each other."

Luck

"Anyone who tells you that you sit down and plan your career and that its all something you planned on doing is giving you a load. My first senior appointment was a
result of a three-train collision, which is hard to do. But all of a sudden, the place was desperate to get someone to run a small piece of the organization and they asked me. I did a good job and I got promoted into a high profile job so that when the position of CEO in another organization opened up, I had a reputation in the business and they called me to fill that vacancy. Now that’s absolute luck.”

Appointment as CEO

And, when Dan was appointed to the position of CEO, he didn’t view it as a big change. “In this particular business, when you’re the Head of Operations, you are the dominant person. I don’t remember it being a quantum change in terms of what I was doing before. The goals of the operating manager are much the same as the goals of the CEO. The operating manager just deals with a more narrowly defined set of problems. When I took the position of CEO, I had a pretty good sense of the way I thought a place should be run. I remember I made a fairly small checklist of things that were important to me to make things work. One was my relationship with the board. This was the new ingredient. I had to interface with a board of directors and the chairman was a political appointee. But I had a game plan so to speak. I always have one when I come into these places because my game plan tends to work.”

Career Expectations

Over the past twenty years, Dan has held a number of CEO positions and he spoke about the duration of these types of positions: “These senior level positions usually have a life expectancy of about six years. You can only do so much. In one position, I had done what I had to do. Everyone thought I was great and wanted me to stay. But I said, ‘It’s time to go because I’m getting bored and I’m getting complacent and man, that’s a bad sign.’ Anybody who thinks that this is a career doesn’t understand the job. Initially you have the ability to bring change, bring direction to the organization, influence things but after you
have been in the job for a period of time, you've done your tricks and its time to move on."

**Future Aspirations**

This position will probably be Dan's last as a CEO: "I think I've had enough of the hot seat. I'll go home and stay there for a while. I might retire. However, if I get a call to do some consulting working, I might do that. One of the large railroads in the US has approached me. But I'm not about to leave here. I got thinking that when my contract expires here, I will be almost sixty-four. At that point, I'm not going to take on another one of these major rebuilds without the total commitment of the governments involved. I'm only successful if you are rebuilding and fixing things up. The second they do not want to do that, they won't want me around. I'll just be a miserable SOB. So, unless everyone is committed to seeing the project through, I'm not interested in taking it on."
John

"You have to do what you believe God is calling you to do, not what others want you to do or think you should do. Hopefully, there will be some symmetry in the two, but in the end, the important thing is to do what you believe you are being called to do."

General Background

John is President and CEO of a large organization that is known worldwide for its work to alleviate hunger and poverty in third world countries. He began his career with the organization as a summer student in the media department. Upon graduation from seminary, he was offered full-time employment as an audio-visual programmer and subsequently became the Creative Director. John was then asked to take on the role of Director of Communications in the organization's International Division. Four years later, he became a director of one of their foreign offices where his initiatives significantly increased revenues for the organization. Upon completion of this assignment, he decided to take a lateral move to Canada. He came here as a Vice-President, subsequently becoming Executive Vice-President before being appointed to the role of President and CEO.

Home Environment

John is the eldest of four children born within a span of four years. All are college graduates and his sister has a Ph.D. John remarked that it always felt like they were "kind of their own tribe." His father ran a dairy farm as well as owning a GM franchise. His mother was a nurse.

"I feel I was very blessed. I grew up in a strong Christian family. A strong church life was very much a part of family life. My parents were a tremendous encouragement and tried to give us opportunities they didn't have. You always felt that you could do anything, that the world was kind of your oyster. One of the things that I admired about them so
much was they weren't afraid to let us achieve or try things in areas that they hadn't experienced. I am more and more impressed with that since becoming a parent myself. I was sometimes hesitant with my kids to let them do what they wanted if I hadn't done it before. Whereas, my parents were really unfazed by that. I suppose part of it was I grew up in a somewhat sheltered and protected environment where parents were confident that nothing terrible was going to happen to you. It's a lot tougher if you live in a large city where you are feeling much more under siege by things that are out of your control.

"In a lot of ways, we were the typical middle class American family. I helped with the chores on a daily basis and sometimes helped out on the farm in the summer." 

Influence of Parents

John described his father as being both a farmer and an entrepreneur: "Our situation was different from the other farmers in the area. My father not only ran the dairy farm but he owned a GM franchise. He grew up during the depression and when he was twelve years old, he took over running the farm when his father had a nervous breakdown. I think this had a significant impact upon him. I would say he was almost a classic workaholic. If I had any complaint, it's that he worked incredibly long hours. But there was always a deep sense of his love and he was there when I needed him."

And, his father's work ethic obviously had an effect upon John. "I think I was in grade three and at that point we had hired a man for the dairy farm and we lived on a different farm. I looked at the other children in school, particularly the boys, and came to the realization that my situation was somewhat different than theirs. While most of the other students came from farms where their dad was the farmer, my father ran two farms and a car dealership. It suddenly occurred to me that I ought to take more seriously this need to work. And so I went to my dad and said, 'I want to start working in the barn and helping out more than I am.' So from the age of about nine, working on the farm was very much a part
of my childhood.

"And, I think my dad was a real inspiration to me, not just in the sense that he worked so hard, which is very true, but he had a wonderful positive view of life and I think that is one of the reasons for my energy and my positive attitude. It comes from him. I don't think there is any question about it. He was that kind of person. And I suspect, partly because our personalities are somewhat similar, that really generated energy for me. I'm probably more sensitive to it since he has passed away. And I miss that. It was a quality I don't think that I fully appreciated even when he was alive: his enthusiasm, his positive regard for people and things, always interested, always prepared to do something for somebody else. He just had a passion for that. So I think I'm locked into that in some ways.

"Whereas, I think I get more of my intellectual side from my mother. Although she too was a very positive and helpful person, she was more intellectually adventurous than my father was. And, she was very solid theologically, more thoughtful and reflective about her faith. She also was a very competent person who had a more realistic view of people than my father had. He could be taken advantage of and I think invited it sometimes. On the other hand, although she wasn't in any way rude or uncaring, my mother was more realistic about people and about things that could happen or didn't happen."

**Family Influences**

John also mentioned that his grandparent's values shaped his concern for others:

"My father's mother had a real heart for people. Although she was extremely overbearing, she had a wonderful love for people. She was such a committed person. And my dad's father had my father's fire in some ways but there was something wrong with him that he got depressed as well and had a nervous breakdown. He had a great love for children and the grandchildren were always the most important thing in his life."
"My grandmother on my mother's side was also a very positive and encouraging person. But she was very much a woman's woman and so was closer to my sisters. But she was a great friend and not afraid to speak her mind like my mother. She was married to a deeply spiritual man, who never had nervous breakdowns, but could be a rather depressive, negative person. During his last year, he was almost paranoid that he was losing his faith, that somehow he wasn't good enough. It was really quite sad. And my grandmother just nursed him, coaxed him, and would pray with him. It was a wonderful inspiration of how two people coped with each other. I admire her so much because she handled that so well."

**Academic Pursuits**

John attended small rural schools for both his elementary and secondary school education. He was class president a number of times and edited the school paper in both elementary and junior high. While in high school, the guidance counsellor selected John to represent the school at a state forum, an experience that exposed him to higher achieving students and to the world of politics.

"I was totally floored when he chose me to represent the school. I'm not aware that we have this in Ontario, but they brought kids together, one representative from each of the high schools across the state and you participated in sort of a mini-government. So it was a pretty large group and you lived in community for a week. There were elections. You were a representative and they elected a governor. I guess I was a member of something but it was at a fairly low level. I didn't really aspire to a role of leadership because some of the kids from the bigger city schools were really more tuned in to what was going on.

"But I learned a lot. On the one hand, there's obviously brighter kids here than I but I'm in the league. I'm not out of my depth here. So, don't be afraid to try things. And I think
that was the message for me. I think just the fact of being nominated was an encouragement for me. It made me a bit more reflective about what I wanted to do, what gifts and skills I did have. And so it was a small thing in some ways and yet a big thing in other ways."

One of John's most interesting experiences in high school was his bid to become president of the student council: "I lost by one vote. And I voted for the other guy. An important lesson. But it was in some ways, one of the most enjoyable experiences I've ever had because we really tried to make it a good time. We did commercials. I got one of my friends and he worked with me and we just had a ball. But I would be less than transparent if I said I wasn't disappointed that I lost because the fellow that defeated me wasn't a particularly respected person. There was a fair amount of disappointment amongst some of the leaders in the school. But it was an important lesson for me because up until that time, I don't think I'd ever lost anything that I had competed for. I suppose it was just humbling to realize that you've got to work at it but you can't always presume that you'll win. And there was a certain false humility about not voting for myself. I think that was a good lesson, not because it was wrong but I think it was a bit out of touch with reality to have voted for him."

Upon graduation from high school, John decided to attend a private liberal arts college: "It was definitely a conscious choice on my part to sort of spread my wings and push myself out of what was comfortable. But it was a SHOCK for me. It was a very good school and it liked to think of itself as the Harvard of the Midwest. It was a tough academic environment. I mean, it was HARD for me the first year. I didn't get particularly good grades. In fact, I wouldn't consider my university academic record to be particularly good, although it was acceptable. I graduated."

John believes that the difficulties he experienced in college were partly rooted in the political climate of the time and his choice of philosophy as a major: "When I went to
college it was during the sixties when the anti-religious sentiment in the states was at its height. And this was a kind of a pseudo-intellectual school and I found that tough. I also had trouble selecting my major. I was getting a bit desperate because I was running out of time and I really needed to declare a major. So I chose philosophy, partly because of the seriousness of the subject and the idea that you were trying to address issues of great significance, at least, intellectually. But as I said, I was in a pretty tough environment in terms of my faith.

"To a certain extent, in retrospect, when I chose philosophy, it wasn't a major which particularly suited me. It didn't fit with who I was. It would have been better if I had majored in drama or something like that. And as a student at college, I was still pretty narrow. I didn't touch booze during the four years I was there. I was still attending the Pentecostal church in which I had been raised. During my years at college, I did really move away from that, though I found it difficult to do.

"But majoring in philosophy required tremendous discipline in terms of thinking through issues and it has impacted upon the way I think and write today. I would say I'm now biased towards the liberal arts education because I feel you can take what you learn and use it in so many ways. It was a good experience over all, but it was very hard.

"I also found it tough to make friends although I did make some lasting friendships. It was a pretty small group but I learned so much about life from them. One good friend was an Easterner whose father was a Harvard doctor. He exposed me to a whole different culture and lifestyle, particularly, the intellectual side of things. He had gone to one of the private schools out east so there was a level of sophistication about his manners, his artistic pursuits and I suppose a standard of living that was different from mine. His family lived in a house in the Boston area countryside. There was a tomb of a revolutionary soldier on the property. So the whole culture was different than the mid-west United States where I had
grown up.

"He was editor of the school newspaper, so he was a good writer and very articulate. He enjoyed my friendship and encouraged me. He really challenged me and wanted me to run for president of the student body. In the end, I turned it down but it was good that someone thought I had the ability to do that, even though I chose not to do it. He also challenged me to reflect upon the deeper issues of life. Some of the things are almost cliché I suppose: the meaning of life and death, what's important, what's truth and is there such a thing as objective truth.

"My cousin also ended up coming to the same school for his last two years of college and he was a strong influence. He had gone to a church school before then. We always hit it off. He was always interested in artistic things, big ideas. And that was very much a part of my growing up in university. It was very good for me.

"At university I got a broad base of knowledge: psychology, economics, history and the history of science which I really enjoyed as a non-science major. It was an interesting program because of the way they had set it up. It wasn't just sort of chemistry or physics but you actually duplicated some of the major scientific experiments that determined modern science. So, it was a very interesting way to do it. That was all part of my grounding. I had a sense that I wasn't afraid of people who thought and I wasn't afraid to think for myself. That's probably one of the most important things I got out of my liberal arts education and I didn't realize at the time just how important it would be. I think that is one of the challenges we are facing now with people getting more and more focussed so early on in their careers. If they are not careful, they are quite narrow and if they expand, it's sort of on their own time, pursuing their own things. With a liberal arts education, you're not quite as strong in a technical discipline but you do get a broader picture of society and academic and intellectual thought. I think it's great."
In contrast to his experience at college, John found seminary was easy: "It was almost the opposite experience to that of college. I took to it like a fish in water. It just pointed out that this was my calling and my college years, as valuable as they were, simply gave me a broader foundation. I think when I got to seminary I really touched the passion that drives my life, which is to try to understand the ways of God better and be empowered in some way to express that. It's goes back to the point I made earlier that faith is important to me. That's the thing that underlies all. Obviously, the bias was on the intellectual but there was still an acknowledgement that feelings were important. They had a school of psychology on the campus.

"But in terms of my calling, I wouldn't attribute it exclusively to what I experienced at seminary. I think it was also working with this organization during the summers. I'm not sure what I would have done if it hadn't come along. I really don't know. I think I would have been in some trouble. I probably would not have known exactly what I wanted to do. Whereas, I kind of fell into this organization.

"I believe strongly in providence and I think this is an example of that, especially for the style of my personality. There were other people in my situation who had spent the last two or three years of seminary saying, 'What am I going to do next?' and had it all planned out and went on to great careers. But that just didn't connect for me. Partly, because I wasn't sure at some level."

**Career Aspirations**

As highlighted, John never set a definitive career goal even after graduation from seminary. Rather circumstances or events precipitated the need to make a decision and his choices tended to be underpinned by his faith and religious experiences.

"I just wasn't a career thinking person and I think, with the benefit of hindsight, a part
of it may have been that I probably was slated for a career in religious work a long time ago but I think I rebelled and fought against it to a certain extent. It wasn't until I got to seminary that I think that I was sort of starting to go in that direction. I had some inklings of it when I was in university but I think at that point, the world was kind of big. It was your oyster and you could think about lots of things. And I suspect I was just a little bit fearful that it would tie me down too much, that I wouldn't learn and experience what I would like to.

"I don't think there was any push to go into religious work from my parents either. They were happy that I was going in this direction but I didn't feel pressure from them. They were amazingly neutral about that with their children. They have supported all of us. I think my mother was delighted that my one sister became a nurse since she was a nurse. But I think they were pretty open. They were incredible examples in terms of believing in their children and not trying to put too much of a restraint on them."

Impact of Early Employment

While John was attending school, he held a number of summer jobs that were valuable learning experiences for him. The first of these was working as a salesman in his father's auto business.

"I worked on the farm up until my sophomore year in university and then I worked for one or possibly two summers at my dad's auto business. But frankly, I didn't really enjoy it because I wasn't a natural salesman in that business. As I think about it in retrospect, I don't think I was very aggressive and I think socially, I felt a bit out of my depth somehow. It was a town that I hadn't grown up in, so I didn't know the people that well. And I don't think I was pushed to or probably motivated enough to go out and do some of the cold calling work that really needed to be done. But it was still good for me. It was fun to be with my dad and it gave me a better understanding of what he was doing.

"And then in my last year in university, it was the first time I had a job that took me
away from home. I lived on the campus of a Christian college and worked on the truck docks loading freight. It was really a great experience because I was working with really tough working-class guys. It was all shift work and it was hard work physically, although I was young and strong. I probably took the job because I made good money at it. I remember that I went home most weekends so it wasn't that I lost touch with the family."

When he began attending seminary, John worked for his uncle who was employed with an organization involved in missions. His job was to dub tapes from a master for distribution to stations across the United States for broadcast.

"It was so boring and I wasn't really comfortable with it. I respected my uncle but it was a very, very conservative old-fashion fundamentalist kind of Christian organization. It was like my theological training was here and I was working in this organization over there. Not that they weren't connected but there was such a difference in the theological perspective between the work I was doing and what I studying and really, my own personal religious beliefs. And there was no opportunity for growth. In retrospect, as I think about it now, it was kind of crazy in a way because this mission was involved in Mexico and Latin America and my uncle never offered to take me with him. Maybe it was because at some level he didn't trust me. I'm not sure. Possibly, he had an awareness of some of the theological gap but in light of what I ended up doing, it's really kind of interesting.

"I did that for a year or a year and a half and it just drove me nuts after a while. Then I started assisting a professor who was a filmmaker and that's probably where I really started moving into my strength as a communicator. And it was great fun. I did that for about two summers. And then he left and that's when I hooked up with this organization. Staying on with them during my last year of seminary was obviously saying for the first time, 'This is important work. I like this, I want to stay with this.'

"And then after I graduated from seminary the next May, I was asked to come on
full time. I think at that point, I really was making the decision that this is the work I wanted to do. Up until then I don't think it was clear. And even then I wouldn't say that I had committed myself to it as a life calling. That didn't happen until some years later. I was in it because I believed it was the right thing to do. I had no idea whether it was going to last a long, long time. If someone had told me at that point that I was going to be at this for twenty-five years, I doubt I would have believed it."

**Personal Characteristics**

**Interests and Hobbies**

As a child, John was interested in sports. In elementary school, he played both baseball and basketball. However, when he matriculated to high school, he decided to forego playing basketball: "I could see that I just didn't have a lot of future in basketball. I didn't have enough natural ability and I wasn't very tall. So I became a wrestler. As a senior, I went to the state championships and in college I won a number of tournaments. On a bit of a lark, I also played some football in my senior years. I really loved athletics."

John's competitive nature was not only evident in his love of athletics but also in his participation on debating teams and in extemporaneous public speaking contests where he was required to prepare an eight to ten minute speech in half an hour and did quite well. A good portion of John's work now involves public speaking and he finds this a good outlet for his creativity. "I'm still writing most of my talks at this point but obviously there is just too much coming out of this place to do it all. But I've kept my hand in it so that it still has my imprint on it somewhere, my soul."

John also competed in music contests where he was an A level soloist. He sang in the church choir and enjoyed participating in dramas and musicals: "I started out in little pageants at church when I was probably six years old. When I got to junior high, I acted in
the musicals and dramas. We had a very good principal teacher who really pushed us. I did the same in high school and usually had the lead.

"In my first year at university, I was in one play, and then partly out of time, I didn’t do any more drama. In retrospect, I don’t know why because I think it would have been good for me. But I did a tutorial in drama with the head of the drama department. It was great fun. I did it on the Norwegian playwright, Ibsen. I read virtually all of his plays, wrote a paper or two and met with the professor. It was one of my most meaningful experiences in university. The professor was a good man. In a way he somehow tapped my heart. Whereas, some of the other teachers were quite aloof or in some cases were a bit antagonistic particularly in regard to my religious faith. But he was an Irishman and loved all things Irish including religious things. Then once I got to seminary, I didn’t do any drama but I got involved in film. So that was kind of a different move."

Need for Accomplishment

The need for accomplishment has been a strong motivator in John’s life: "I’ve always liked pushing myself and seizing the next challenge. I think it’s been a style in my working life that has been important to my success. I’ve always had ambition at a certain level. I’ve always been challenged by what I am doing."

John believes that although having a goal, a passion and a vision for one’s work is good, there is also a need to focus on the task at hand: "I believe strongly in the adage, ‘Flowers that bloom get picked.’ It is much healthier to work on what’s in front of you than be second-guessing yourself all the time, wondering if this will get me the next job or get me what I want next. You put an incredible amount of stress on yourself that way. And I think, often times, those doing it that way don’t get chosen. It’s more important to be dedicated to accomplishing something than wanting a position. The position always needs to be secondary to what you want to accomplish at the moment."
**Values**

John has a strong commitment to his religious faith as well as the more traditional values such as loyalty and honesty: "It’s important to have some values that are going to stand the test of time. I have found that my faith in God and his revelation in scripture to have been extremely helpful in dealing with the myriad of issues I have had to face. A strong church life was very much a part of who we were as a family and it is very much a part of my own motivation, self-worth and self-esteem. And loyalty and honesty are really important. People respect you when they believe you genuinely have an interest in them, that you’re trustworthy and that you are not someone who kind of bends the corners to suit yourself.

"And though its tougher now, I’m not afraid to do some of the more mundane tasks. One of the things I believe is that all work is important. Yes, there are some things that are more critical in the sense that, if the money doesn’t come in, we’re out of business. But it’s amazing. There are a whole bunch of smaller things that, yes, you can stop them and on their own, it probably wouldn’t make any difference in the beginning but it’s all part of the fabric that makes up an organization. It’s important when you get into positions of senior leadership that you don’t lose touch with the sort of mundane activities that are really important to an organization.

"There are times when I do them to set an example for staff and to remind myself that’s what I am really about. Things like making sure the room is set up right, picking up paper clips off the floor or when walking outside and there’s paper scattered all over that’s obviously come from a staff member, not to walk by but pick it up and take care of it. Little things like that. And some of the bigger things: not always having my executive assistant do everything and every once and while to just surprise people and help them understand that I’m sincere, that I’m not afraid to do it or it’s somehow beneath me. But it’s a lot harder
now to do that kind of thing. One has only so many hours in a day and it might feel good
do this but you just have to say, 'What else have I got on my plate and what's going to bring
more value to the organization' and you have to do those things. But it is those little things
that add the variety, the texture and probably the cement that holds everything together. I
guess that's what I'm trying to say and I think that you mustn't lose that. You need to look
for opportunities to practice that wherever you can and however you can.'

Being positive, energetic and enthusiastic about his work are also characteristics of
John's personality, traits that his father exhibited: "People love positive people and there is
such a lack of that sometimes. I see people who are so weighed down with problems or
concerns and a positive person coming into the room just lifts everybody. Sometimes I'm
amazed at the lack of enthusiasm that people have for their work. I just don't understand
why they even do it. Maybe, they don't have any choice. But it's a shame. They are
throwing their life away. We have only a few short years on earth. So, even if you don't like
the job very much, you can still be enthusiastic about it. It would make it more enjoyable.
But maybe, I'm just reflecting my personality type."

Need to Help Others

As a student in college, John was politically active. He participated on debating
teams that discussed social issues and he marched in anti-Vietnam demonstrations:
"There's always been a sort of social action bent to my interests. I've always had a concern
about racism and poverty. While attending seminary, I was exposed to the work of John
Woolman, an obscure Quaker who was very opposed to slavery. Although he was rather
eccentric, he was a very honest, just and principled man. And, I was impressed with him.
For example, he refused to wear anything but black and white because some of the dyes
used to colour clothing were being manufactured using slave labour.

"And I was also influenced by Tom Skinner, a black African-American evangelist."
He was very committed to a Christianity that dealt with social issues as well as spiritual issues, although that's kind of a misnomer, since they're all connected.

John remarked that stories about missionaries also had an impact upon his values—people like Borden of Yale and Hudson Taylor of the China Inland Mission. Sometimes, missionaries from overseas visited the church where John was attending and he heard first hand accounts of their stories and he was impressed by their commitment, bravery and courage.

"Their stories confirmed that faith was important and it was worth risking your life to communicate that. Secondly, I think they communicated that you shouldn't be afraid to take risks. That's not unique to Christianity, but it's certainly a part of Christianity. Anyone who wants to do something has to take a risk. So I think that was important to me. And I think their lives and stories were also important in the sense that they confirmed to me that you have to do what you believe is right. You have to do what you believe God is calling you to do, not what others want you to do or think you should do. Hopefully, there will be some symmetry in the two, but in the end, the important thing is to do what you believe you are being called to do. And that was a strong element of those missionary stories."

Creativity

John described himself as a creative type. He started out as an audio-visual programmer and was involved in multi-image work. One of the projects in which he was involved was national in scope and involved a fair amount of risk. "Two of us put together a forty-five minute presentation using six or seven slide projectors. We took it all over the country. Nobody had ever done that before in the organization and working on this project certainly gave me confidence that I had enough juices and the ability to make it happen, even though at some point we thought this thing could go down in a heap of flames. But it didn't. We felt like it was going to work. The outcome didn't bring any great advancement
or promotion but certainly it created an awareness of my ability and the abilities of the team that had worked on it."

An unusual situation then occurred when John's supervisor decided to go back to school and they traded positions: "When my manager went back to school, I became Creative Director and I became his boss which was pretty unusual. But again, I think that it's just an example of working well with people and not being afraid to do something different. And our boss, bless his heart, let us do it."

**Leadership Skills**

Involvement in positions of leadership began early in John's life. During his years in elementary and secondary school, he was elected class president on several occasions. He was president of a small youth group in his church and when he attended college, he headed up the Inter-Varsity Christian Fellowship group on campus. He remarked, "I had some good leadership opportunities in college that were really helpful in giving me confidence in my own faith and my ability to lead others."

When he became President of the Student Council at seminary, he was allowed to sit in on the faculty meetings as a student representative: "That was a really interesting experience and I think it was a substantial part of my leadership training. Not that I can point to anything specific but what was valuable was just getting the feel of what it's like in this kind of environment. I'm more of an intuitive type in my thinking style and sitting in these meetings gave me a sense of comfort because I got to know what goes on in these types of meetings as well as the dialectic and the thinking processes that go on."

John remarked that a number of his classmates wouldn't be surprised that he is now leading an organization: "I've always been pretty highly motivated. My high school typing teacher always thought I would lead something and probably would become an executive. I remember her saying this because it really caught me off guard. I had never pictured
myself as an executive. I was more of a creative type and I thought being an executive would be boring. But I think I've always enjoyed the role of being a leader and by the time I got to seminary, I knew I wanted to be the leader of an organization. I remember one of my professors there giving me a bit of a hard time for saying that. He thought it was a bit presumptuous of me to assume that I could do this. But I didn't see it as a power issue. I saw it more in terms of being an influence. I don't particularly enjoy telling people what to do, that's not my style. But I enjoy and love to see things get done. That's just been a quality that I've had most of my life and how I view my role as a leader."

As a leader, John feels that it's important to have the ability to be sensitive to what is going on around one's self, an ability which he calls "lateral perception."

"I think that how you're being perceived, and how you're perceiving others is really critical to leadership. As I look around at people who are leaders, it seems that most leaders have that ability at a certain level. It varies. Occasionally you meet someone who is just so talented that it doesn't really matter to them what others think. They just do what they want and people put up with it.

"But what I'm getting at is that when you're in the midst of a conversation, you become aware that the person with whom you are conversing is reacting in a certain way or maybe not reacting. So you actually move off the issue to say, 'Gee, you seem to be concerned about this or you don't seem to be concerned about this' or 'I noticed a lack of enthusiasm in your voice, what's all this about?' That's one level of it within the context of a discussion. The other level is how you are being perceived.

"I'm really going back and I hope I got this right, but an example of this would be during the time I was involved with the multi-image shows. Probably after the third or fourth one I had done, I was listening and watching and I figured out that the Vice-President of Finance was critical of the way I was spending money. So I went to him and said, 'Ken, I'm
getting feedback about such and such and I don't understand this. Let me tell you what the vision is for this. Here's what we have to do and you can't do this kind of production cheaply. If you do, you're going to get a cheap product. It isn't just the question of going out and buying a better bicycle. In this case, the better bicycle will help a lot more people understand what we're talking about. In the end, it will raise more money but it will also create better relationships for us.' And then he understood.

"I often see people who never get in touch with what's going on until it's a big problem, till they've lost credibility and the problem has become so deep that it's a big task to unravel it. That's what I'm talking about. Sometimes, it's working with your own staff and while you are looking at what they're doing, you are also paying attention to how they're doing it and even more importantly, how they are feeling about it. So often people are only focussing on what they are doing and that's almost a badge of honour in our times today: I don't care how you feel about it, get the job done! And that works for a while. But, you are not going to have a happy employee and I suspect they are not going to be with you long term if their feelings are negative about something. Even men are driven a lot by feelings. We don't have a reputation for it, but if you unravel it, we are. And I think in our current environment today, it's even more that way.

"It's also knowing when you are being heavy handed or when you are being too light. And trying to be aware of that. I would be the last to say I get it right all the time but that's the goal and that's what I'm talking about. I'm just more and more convinced, especially as I'm watching some of our younger leaders here, that it's one of the toughest things to teach. In some cases, people don't have the ability to be perceptive that way. And it's very difficult. I'm sure it can be taught but what's so tricky about it is, if you're not careful, it becomes a put down. And it actually becomes a discouragement to people because you are messing with something that is so deep and so much a part of who they are."
Risk Taking

"While I was growing up, I was encouraged to take risks, not to be afraid to succeed. If anything, in retrospect, I probably would have been better prepared if my parents had been tougher with me in terms of schoolwork and things like that. But they were very trusting and in a lot of ways, maybe they did the right thing. In a sense they said, 'Hey, it's your challenge. We believe in you, go for it.' So, whether it was drama, athletics, class leadership or editing the junior high newspaper, I just took a chance and did things, expecting something good would happen. Most of the times it was good. Sometimes, it wasn't. But when that happened, I didn't take it too seriously.'

John recalled that one of the first significant risks he took was to go to California for his seminary training: "I did something that none of my classmates did. It was a university on the other side of the country from where I grew up. It was a whole different culture and I think I was totally out of my environment. At the time, I didn't fully realize what I was getting into. I had grown up on a farm in the mid-west, the population of my hometown was about a hundred people and about the farthest I had travelled was about a hundred and twenty-five miles to the nearest city. But I had a sense of call about it, not a deep spiritual one, but a sense that it was the right place to go, that it was where I was supposed to go. The area manager for Inter-Varsity Christian Fellowship had attended this seminary and he was encouraging me to go there. When I did make the decision, it was pretty subjective. I liked their catalogue. My decision to go there was akin to sticking your toe in the water to find out what it's like.'

Handling Disappointment

When John faces disappointments he handles them by taking them in stride: "Most people would say, 'If you get it half right, you're doing pretty well.' I try to remember that, but at the same time, I'm pretty obsessive about excellence, about getting it right. If I'm
really overwhelmed by something, I'll read scripture, just sit and meditate and I'll pray so I get my balance back again. Sometimes, I will talk to my wife or I'll discuss it with the senior leadership team. There really isn't anything that's bad in the end. I don't want to give the impression that I'm cavalier about it or there aren't things that bother me, but that's usually the way I cope. I think it's also important to keep short accounts and be quick to forgive. Too much time is spent worrying about what someone did to you. In the end, what's most important is not what someone did to you but how you handled it. How big do you want to make it? That's what's important."

**Career Development**

**Career Decisions**

John has made a number of decisions that have impacted upon what he does and where he is today. One of these was his decision not to be ordained: "It was a big struggle. There were a number of issues. I had moved from the Pentecostal church into Inter-Varsity Christian Fellowship, an organization which isn't really a church but had sort of become my church. And then while in seminary, I had started going to an Episcopal church and I wasn't sure I wanted to be an Episcopal priest at that point. The church has a rather high liturgical style and they're into tradition which was quite the opposite of my Pentecostal roots. And I just didn't feel a calling to be ordained. I felt I didn't want to go after it just to have it. I also felt that not proceeding to ordination wouldn't hamper me in any way from expressing my Christian faith."

John recounted that although he was struggling with this issue, in a sense, the decision was made for him when in the summer preceding his last year of seminary, he needed a summer job: "I had done a crash course in filmmaking and had been working with a religious filmmaker for the past two summers. He was off on a sabbatical, so I didn't
have a summer job. And one of the large humanitarian organizations called and they were looking for someone who could do some writing for them in radio. I hadn't a clue about writing for radio but I had written film scripts and stuff like that. So they took a chance on me, partly because I had always had a concern about racism and poverty. Although I thought the organization was a bit old fashion and too conservative for me, I really liked the people. I was in contact with the leaders and those who were likely to become the next leaders and I just hit it off with them really well. So in the middle of that assignment, I came to realize very clearly that my theological education was very helpful to me but I also was almost convinced that ordination wasn't necessary, that there was still time to do that. And, in some ways, there is an advantage to not being ordained when you are working in a parachurch organization. People don't see me as a kind of Presbyterian, Anglican, Lutheran or whatever, so it doesn't lock me in quite as much. Quite frankly, in the end, the decision to be ordained is very subjective and you either feel God's call for it or you don't. I still romanticize that maybe that's my next career, that I'll go back and get ordained and spend my last years working in a church. I don't know. We'll see."

John's next decision to move from the organization's United States headquarters to their International Division had a significant effect upon his career: "I was approached to take a position in International Communications. I had just gotten involved in television work for the US organization and really didn't want to leave. But when the guy who approached me said, 'This job is really about being a voice for those who have no voice,' that really got to me. So I negotiated to keep my US TV job as a separate thing and I took on this new project. I set up about twenty offices around the world. Tremendous experience, culturally. I didn't realize just how much at the time, though in some respects I found it difficult. I get a lot of my satisfaction out of being at the front end of something, either raising money or directly helping the poor and in this instance, I was in the middle
trying to connect them. After four years of that, I'd had enough."

John's next decision to move to the other side of the world would have a huge impact upon his subsequent attainment of the position as CEO: "It was a great experience. It put me into a whole new environment. If I had stayed in the United States, I think I would have had a lot more trouble moving on. There was a little bit of, 'they've seen you too long'. I needed to go somewhere else. I was having lunch with a director from overseas who was leaving for Hong Kong. Now, I hadn't talked to my wife and I honestly don't know where this came from, other than obviously, I knew I needed a change. So, I just said to him, 'What would you think of an American taking your place?' And he said, 'I don't think it would make any difference.' And then I said, 'What do you think of this American taking your place?' He said, 'You've got the international job, I never thought you would be interested.' And I said, 'I'm interested.' And so, that's really as much as I had to do. He then told his boss who was coming through the states within the next couple of months. We had known each other a bit before and had hit it off. We had dinner together at our house.

"They saw me as being pretty much the same age as the person who was leaving. And, I had background in a bigger environment and I think that was seen as being positive. I also understood broadcast fund-raising and that was something my predecessor didn't have. I had the ability to communicate effectively both interpersonally as well as in the writing and the creative work that I was doing. They liked that, they respected it. I had done things in many different environments. I got along well with people. I'm a person who is quite amicable. For me, people are always more important than the issue and when you're working internationally that's really critical. So I got the job.

"While there, I made my most significant ongoing contribution to the organization. I set out to duplicate the television recruitment work that was being done in the United States. It was a real challenge. I was working with an advertising agency and there came a point
where they essentially said that what I wanted to do wasn't possible. I basically laid down the law and said, "You guys had better help me figure how to make it possible or I'm going to another agency." When I think about it, it is one of the few times I've really had to plant my feet like that and say 'This is it!' And, to their credit, they came around. They got the message and through a whole set of what I consider divine providence, we were able to do what we had to do. It just revolutionized the organization. It probably quadrupled the income."

There have also been career decisions John has made that were not particularly to his liking but did enhance his career. One such choice was his decision to come to Canada after completing his assignment abroad: "I looked at some things outside the organization but nothing really clicked and I knew the president here at that time. He's always joked with me and said, 'When was I going to come to Canada?' It would be basically a parallel move. I had been a Vice-President and would be coming to Canada in that position. That was going against the grain a little bit. But I really felt my chances to become president over there were probably not very good. I had accomplished the work they had given me and my internal clock said that it was time to move."

After his move to Canada, John was asked to become an Executive Vice-President, a position he accepted with some ambivalence: "Being a Chief Operating Officer is not one of my strengths. The decision to become a COO was against what I would normally do and yet I learned a lot from the experience. For example, I learned that I'm not really keen on having a Chief Operating Officer. As President, I will avoid it as long as I can, not because it's a bad thing but I saw some of the weaknesses in it and I think if you can get along without one, it's great. It will be interesting to see whether or not I can. I've survived the first year, so, we'll see. I learned from that experience what things I don't like to do and I also learned how to quickly delegate them."
Balancing of Roles

Working with an organization that requires him to travel world-wide has presented some challenges for John: "I try to be home for the significant times and I now discipline myself not to be away for more than two weeks at a time. That was one of the issues in our marriage that was dealt with quickly. It was one of the things that used to drive my wife crazy. I would be gone three weeks at a time and in some cases, when I was in communications, I'd extend it longer. So we had a heart to heart talk about that and I made a commitment that I wouldn't do that anymore unless it was an absolute emergency. And I've hardly ever had to do it. That really gave her closure and a belief that I was under control, that she wasn't going to be up against needy people all the time. I think, more than that, it said to her that I am really committed to our relationship. On a conscious level, I have tried to have times when my wife and I can be alone together and talk. Vacations have become significant times as well as a couple marriage enrichment seminars we've attended."

John's wife works full-time at the church and they find that their work complements each other's: "My wife helps me a bit with my corporate work and I help her at the church. So we are embroiled in each other's lives. And maybe that's good in a number of ways because we're both very busy people and neither one of us has time to mope around and about, thinking we're not getting enough attention from the other. I think we're both so motivated and respect and love what the other person is doing. It has made for a pretty good marriage."

Because of his commitment to his work, John does feel that he did miss some opportunities to be with his children, particularly his son: "I was just not being smart enough at the time. I don't think I spent enough time with him. That's probably the biggest regret I have with my children. I probably did a better job with my daughter who is six years
younger. But we've been blessed with our kids. They're well adjusted. We've experienced some of the usual teenage problems but nothing serious."

And though John has been active in helping others at a global level, he sometimes feels he should be doing more at a local level: "I'm just not involved in the local community as much as I think I probably should be. Sometimes this concerns me a bit because your life can get so insular if you're not careful. I would have liked to have been a big brother but now it would be even harder. I sometimes think about it but it's just not realistic."

Mentors

Although John didn't have mentors in the classic sense of the word, he did have opportunities to work with some amazing people in leadership roles: "I have been blessed to work with or be associated with some really great leaders and learned things from all of them. From past presidents of this organization, I learned about passion, excellence and deep personal integrity. The chancellor of the seminary I attended became a good friend of mine. He gave me what I consider the first really helpful business advice. He told me, 'You are not a person who is going to find a lot of satisfaction in working on your own. You like to work with people and you like to make an impact. You should be looking at an organization in which to work where you can leave something behind.' It was some of the wisest advice I had been given but I wasn't smart enough or wise enough to see what an asset he could have been to me. Tragically, he died a couple of years later."

Another person who had a strong influence on John was the pastor of the Episcopal Church that he began attending when in seminary: "It was a much more liberal church than I was accustomed to. When I say, liberal, I just mean their priority was pretty strong on the social action side, not as much on the spirituality side of things. Its pastor had been an outspoken advocate against American involvement in the Vietnam War, against racism and a strong supporter of nuclear disarmament and as I left, a strong supporter of Bishop
Desmond Tutu and the whole South African situation. So, it was different for me coming out of an environment that was very Bible based with a strong emphasis on dealing with your spiritual needs and your personal relationship with Christ. Those were still believed in that church but it was not the centre of things as much as I had seen before. It was sort of a classic liberal church. And that was really good for me. It got me out of my comfort zone and gave me a better appreciation of people coming out of that environment, that they are sincere people and that's definitely unfair to say they are not Christians because they don't sort of believe this way or that way. It was a good experience. Paul was an excellent natural leader, with lots of enthusiasm and had a clear picture of where he was going. He didn't suffer fools gladly. Yet, he was prepared to empower volunteers and had a great team of people around him in that church. He was a great fundraiser and was not afraid to ask for people's help. He was very principled and he had a great sense of drama and presence. And as I look back that was true of several of the people who I feel were mentors to me and probably didn't realize it. I've been very blessed and fortunate that I haven't really worked under a leader that I haven't respected. A lot of people don't have that experience and so I'm very grateful. It doesn't mean that they didn't have weaknesses or there weren't problems, but all in all, they were great people and I was very blessed, very blessed.

"It's also interesting that when I look back, I can't say to you in lots of ways the things I learned from them objectively. But I learned something just hanging around with them. I saw them in action. I suppose, I saw their confidence. I saw their willingness to take risks and I think it's interesting that the one thing they had in common was they were disciplined people. They weren't necessarily disciplined in the same way, but they were disciplined and they knew what they were after. They knew what they were about and they weren't prepared to take shortcuts. They did their homework, they expected a lot of the people around them, and they didn't wait for a lot of permission. Everybody didn't
necessarily love them but they were always respected. As I reflect upon it more and more, those are the things you learn and are in many ways obvious when you are working under good people. And they were that."

**Appointment as CEO**

John was appointed CEO after being Executive Vice-President for two years. There were no other candidates seeking the position as two of his colleagues who would have applied didn't do so because they knew John was seeking the position.

"I was the only candidate but the board did their homework. I don't want to sound like it was a casual or careless decision, but it was quite unusual to be appointed in this way. I don't think its ever happened this way in recent times, at least that I'm aware of. And I was blessed in the sense that I had some history with the organization when I became CEO. I had worked at the corporate level for about eight years and prior to that I had worked for about twelve years in some of the subsidiary organizations."

Upon his appointment, John felt relieved that the process was over and he could get on with the job: "Once it became a clear possibility that I could become President and CEO, it was hard to wait. There was an impatience to get on with it. And I was blessed. I got along very well with our previous president. We still are and have always been really good friends. He laid a tremendous foundation here for me and I'm so grateful. He assembled a really good team. I've got most of the team still in place and the board was very good. So I had a lot to be thankful for. In some ways, I sort of pinch myself because it really has gone so well and I was able to slide into it so easily. In one sense when I was appointed, I was elated but also humbled. You don't have to be in the role long before you realize the responsibility. It's strange in a way. People look at you a little bit differently and you feel people's expectations. And they can be a bit overwhelming sometimes. Other times, they're real motivators and make you feel good. It's a real mix."
John mentioned that he has one regret and it is that he wishes he would have been more aggressive in pursuing a leadership role earlier in his career. "The reason I say that now is, and I may be wrong, but I think I could have been a good president in my forties and I've lost ten years. Not that it was wasted time but I really think that I could have contributed at this level sooner. Now, there's probably a good reason and I won't know this until ten or fifteen years from now, but I'm talking particularly in terms of energy level. I think I had even more energy when I was forty and I think in some ways it's just a shame I wasn't able to practice what I think are some good leadership skills earlier in my career. And I think a part of that is probably because I was just a little bit too cautious about pursuing it. And, at the same time, as you would know from the work you've done, you can't predict these things. If there isn't a vacancy in your organization, you can't do it. Maybe I could have gone to a smaller entity and gotten some experience there. But on the other hand, I've learned so much here. None of these things are a mistake and I'm convinced of that. And if I was talking to a young person who clearly had leadership ability, I certainly would encourage them not to be afraid to take some risks. Lots of organizations are now are looking for people in their mid-thirties to early forties to be CEOs."

**Future Aspirations**

John's immediate goal is to grow the organization both numerically and qualitatively: "I'm not a person who has got a life map. I think it's part of my extemporary style in life. But in the next five or six years, I would like to see this organization double in size and to increase the depth of its work qualitatively. It seems impossible but we're going to try. There's a lot that can be done around here. Then, I would probably like to be a CEO in another part of the organization, depending on my health, energy level and all that sort of thing. If I continue to enjoy it as much as I'm enjoying this, that would be great. I'm not sure how long I will stay in the Canadian job. We're now Canadian citizens and we are very
comfortable here but I'm good at something for about five or six years and then I start feeling like it's time to move on. It will be interesting to see if that holds true because this job is more complicated than others I've held."

John is now in the process of writing a book about compassion: "Much of the book will centre on how to live complete and fulfilling lives by showing compassion and generosity to others. I would like it to be a general market book but I'm still struggling with that. It may end up being too religious for a general market book because it's really tough to leave my faith out of it when it's so critical, not just to me, but to the work that I am doing here with this organization."
Sarah

"I believe in the power of long lasting relationships. I think to be successful in business, the most important thing we have to do is to engage with people and treat them with respect."

General Background

Sarah is in her early fifties and is the President and Chief Executive Officer of a large organization in the voluntary sector. Following graduation from university, she began her career as a social worker in a psychiatric clinic in a juvenile court, moving on to take a position with the government as a trainer for parole and probation officers. She was subsequently asked to head up the first volunteer program established as a branch of a provincial government ministry. After working in this position for about two and a half years, she resigned to travel around the world for three years. Upon her return and finding the job market had bottomed out, Sarah did temporary work or as she remarked, "whatever work I could find" for a period of about six months. She then took a job with a non-profit organization providing home support services. About a year later, she had an opportunity to become involved in policy analysis with the provincial government. She worked for three years in this position before joining a major charitable organization where she was responsible for one of the larger services of its kind in North America. After successfully managing and restructuring the division, she was subsequently promoted to increasingly senior positions, reaching the second highest position in the organization. It was at that point she decided that she wanted "the top job instead of being number two and making someone else look good." It was the first time she was conscious of wanting to do something more senior. She used the services of a recruiter and a year and a half later was hired as the Executive Director of a division of the organization of which she is now the Chief Executive Officer.
Home Environment

Sarah described her childhood as a mixture of happiness and sadness. Her mother, who had been ill with a debilitating disease, died before she was a teenager. Although her mother had been given only a year to live, through great perseverance, she lived for ten years.

With the onset of her mother’s illness, Sarah’s father suddenly faced raising two daughters on his own while continuing to run a successful medical practice. "He was a busy physician but he became very busy after my mother became ill," remarked Sarah. "He wasn’t around for a lot of the things that I did. However, I never felt that he was too busy for me. When I wanted him to be around for something, he would move heaven and earth to be there."

Sarah also shouldered responsibilities that other children of her age would not be expected to do: "Even though I had an older sister, I was responsible for myself. By the age of fifteen, I was looking after a household, although we did have some help. I cooked, washed the clothes and to some extent entertained guests that would come to the house. It wasn’t that I was some sort of a slave. It’s just children that age normally aren’t doing those things but it just seemed natural to me. When my older sister got married, I played the role of the mother of the bride instead of leaving a great big hole there. I was only fourteen or fifteen at the time, but that was fine. I enjoyed it. But it’s an unusual thing to do at that age.

"I didn’t have to provide personal care to my mother other than helping her to put her hands and legs in the wax baths or helping with the heat lamp treatments. Probably I did have to help out more. But I wasn’t particularly aware of that. My mother was able to look after herself fairly well until near the end and then she was in the hospital because at that time there wasn’t a lot of home care available."

Sarah also described her childhood as being a very privileged one: "We lived in a
really nice neighbourhood and I had wonderful friends. In many respects, we lived a pretty simple life. Although my father was a respected physician and all that comes with that, we weren't wealthy. But he always made sure that we were looked after. When I was very young, he bought a cottage. He really couldn't afford it but he wanted us to be able to spend our summers outside the city. And being in the business he was, he couldn't get to see us very often but wanted to spend as much time as he could. So he found this place in this wonderful community just outside the city that he could access quickly."

Influence of Father

Sarah's father is someone whom she loves, admires, and speaks about with a great deal of affection. A recent photograph taken at his ninety-fifth birthday celebration is displayed on the credenza in her office.

"My father was someone who was, and still is, fun to be around. We've always had a lot of fun together. Some of our best times were probably on the golf course. We were very competitive. In the winter, we would play cribbage and things like that.

"He was about forty-two when I was born, so he wasn't a young father. He wasn't going to be out, running around, and doing things the way others might. And he recognized that he had daughters and connected in whatever ways he could. He always went with my sister and me to buy our clothes. That was very important to him because that was one way that he could connect with us. Despite always being very busy, he had a lot of friends too. He was a very well balanced person.

"From him, I learned the value of hard work and commitment whether that is to one's family, business or community. I also learned the relative importance of people and money. People would come to him for help and in those days, we didn't have the social programs we have now. That he might not get paid didn't matter to him. He would first help them and then figure out whether they had the ability to pay. And from these types of experiences, I
learned that ultimately you get back a whole lot more than you give. It's just that the
rewards are different. Whatever you give to others comes back in a whole lot of ways:
from feelings of satisfaction to people willing to do things for you when you need it and just
feeling that you've contributed to your society."

Career Aspirations

When Sarah was a child, she always wanted to be a doctor: "I'm sure it was
because of my father. I've always been close to him and I took an interest in what he did.
When I was a kid, I loved to go with him if he was called from home for an emergency. He
used to think I wasn't looking while he was working. That is, until one day I surprised him by
asking why he was using a different stitch this time than he had the last time. When I got to
be sixteen, I used to drive him to his house calls all the time. It was a good way to get to
drive and he would tell me about different things. He was always very good about
confidentiality, privacy and those kinds of things but he would tell me what was wrong and
what he was doing to help them.

"My mother was also a health professional before she became ill. She was the head
nurse in the operating room in the hospital where my father interned. That's how they met.
He wanted to learn and she was willing to teach him. And my father's brother, who lived
down the street, was also a doctor. He and my father ran the practice together. I also have
cousins who are doctors and other family members who are nurses. So it was all very
natural that I wanted to be a doctor with so many of our family involved in medicine and
healthcare. Seeing so many people being helped by a doctor, I decided that this was a
good thing."

Although Sarah remarked that she wasn't consciously aware of it, she believes that
her desire to become a doctor may also have been somehow related to her mother's illness
and death. Becoming a doctor was an important thing to do. "Apparently, I'm identical to my mother. People who knew her then tell me all the time that I act like her, do things like her, look like her and I have her name. And so, I believe I'm a lot like her. But beyond that, it's really hard to tell what influence there was. There are so many things that happen in your life that it's difficult to make many direct connections. However, I can imagine that when one is confronted with this kind of tragedy early in one's life, it makes you call on inner strength at a younger age than normally you might have. Maybe it makes you a stronger person as a result. It's really hard to say. I think though, the fact that people have told me how much I'm like my mother, obviously, has to have had some impact and there is nobody I would rather be like. There are times when I feel really gypped that I never knew her as an adult. It's the one resentment that I have about that experience. I suppose we probably would have fought like cats and dogs because we were so much alike!"

Impact of Academic Pursuits

Sarah described herself as being someone who has always been fairly average: "I really believe that. Everything about me is average. I'm of average physical size. I'm of average intellect. I was never one to particularly stand out in a crowd, nor did I ever want to. I was a reasonably good student but was never the smartest person in the class."

Although she did quite well in school, she began having trouble in maths and sciences in the senior years of high school. Her self-determination led her to pursue an honours degree in science but she continued to struggle with these subjects. During one summer, she decided to take a summer job as a probation officer and this decision was to play a major role in her future vocational choices.

"I was beginning to think maybe a career in medicine wasn't for me and after working the summer as a probation officer, I thought to myself, 'there's more to this', and I decided to back off and change my major to psychology. In the back of my mind, I still
thought of becoming a doctor and I almost went back as a mature student. But I was involved in a car accident. I was not well and I was faced with being somewhat disabled for the rest of my life. So, I made the decision, once and for all, that I wouldn't pursue becoming a doctor. But the social work piece stuck and now I have the best of everything. I'm working in the health field and I feel very comfortable with physicians, scientists and all those types of people with whom I come in contact. And, I get to apply my social work trade on them all the time."

Sarah believes she learned three things while at university that have proven to be invaluable to her success: self-discipline, socialization skills and an understanding of how one goes about learning and then to apply what has been learned to accomplish something. "It is not what you learn specifically while at university that's most important. It's the processes of learning how to learn and learning how to deal with a larger world that makes attending university so valuable."

In terms of being successful, Sarah's believes her decision to pursue an undergraduate degree in psychology and a Masters of Social Work (MSW) were critical elements: "Working on those degrees gave me a direction as well as the foundations that I mentioned that a university education provides. But I also think it was important to have gotten the MSW. I wouldn't have made it this far without something more than an undergraduate degree. While pursuing that degree, I learned the skills that are required to be a provider of direct services in social work and I think it turned out that it was absolutely ideal for the kind of work I do now. And I never would have predicted that.

"Intuitively, I almost know how to deal with things and in many respects, they are rooted in social work training. Simple things and fundamental principles like respect for other people, respect for their point of view, respect for where they're at and how I can help them move along. And it doesn't matter what the process is—whether it's making a
decision, making a career move or assisting and supporting a board of directors so that they can make the right decision. All these things are fundamental to social work. And so, although I would not have drawn a straight line from a school of social work to this job, in essence, I think that the training I got has allowed me to do what is required in the positions I've held and this one is no exception. My formal education may have also made the work that I've had to do easier than it might have been had I not had the training in psychology and social work.

"For example, one of the strategic planning exercises I undertook involved the dismantling of the infrastructure of an entire division. This meant laying off twenty percent of the staff and closing several of the units of this large organization. One of the things that I can do, and this is where I think my social work is operating, is to make things happen without getting too many noses out of joint. Restructuring is a difficult process and it doesn't usually win you a lot of popularity contests. However, the fact that I made it happen has meant that this division has a very healthy financial situation to this day and people still come back and say it's because of the work I did."

**Personal Characteristics**

**Interests and Hobbies**

Golf has been one of Sarah's interests since she learned to play at five years of age. "On Tuesdays, kids under twelve had the full run of the course that was near our cottage. Again, it was part of my privileged background. By the time I was sixteen, I played in the Ontario Junior Open. I didn't do very well but I did have fun doing it."

Sarah also enjoyed playing cards with her friends. She played the piano, and as a youth, was the youngest member of the church choir. She liked reading books, although at that point in her life, she was not an avid reader: "Like all young girls who grew up in that
era, I devoured the Nancy Drew mysteries. Later I tended to read biographies and autobiographies. I remember when I was around eighteen, I read the autobiography of Golda Meir. She was a remarkable woman and her autobiography was a tremendous read."

While in elementary school, Sarah also had a bit of an interest in public speaking, an activity in which she now finds herself frequently engaged: "I was in grade seven or eight when I entered a public speaking contest and won it. I remember feeling really good about it because I had written my own speech and others had not. It was one of those things that you do just because the opportunity is there. However, having won, I didn't then go on to participate in public speaking contests all over the place. I just felt that entering this contest was a good way of getting to feel comfortable in these kinds of situations. You've done it once and you know you can do it on other occasions and survive the experience. When you do this kind of thing when you are young, you can handle it a little better than when you are older."

**Sense of Personal Responsibility**

One of Sarah's traits that has been evident since childhood is a strong sense of personal responsibility: "I was always the kid who didn't act up, not that I was totally a goodie two shoes. I was there helping the supply teachers instead of creating problems behind their backs. I never had any reason to do otherwise. And it has always stood me in good stead. You get more from people and you give more to people if you can be positive and constructive than if you are negative. And to me, a sense of responsibility is in that same ballpark. I just have always had a very strong sense of responsibility and loyalty.

"And, I've always had a certain lack of self-confidence and maybe that's also a part of it. Simply, I feel I must do it all and do it all right or someone will find out that I'm the great impostor. I appreciate my successes and probably over appreciate them in that I think
this is too good for me. In doing so, I probably have not enjoyed them as much as I might have. Sometimes I feel that with the successes come other responsibilities to do everything well.

"It's also important to know yourself. To me, that's another side of having a sense of responsibility. For example, I can't do things by halves. I do things fully or increasingly, as I get older, I don't do them at all. I think you have to be honest about saying no. You can say, 'I can't do this but I will do that.' Some people can skim the surface. I have to do the whole nine yards."

Respect for Others

Treating people with respect and maintaining relationships with others are also extremely important to Sarah. "I believe in the power of long lasting personal relationships. I think to be successful in business, the most important thing we have to do is to engage with people and treat them with respect. I'm a social worker by profession and I do business very much on a people level. From my early childhood, I was exposed to people who really gave me roots and showed me the value of that combination of treating people with respect and having long-lasting, very constructive relationships.

"My values came almost exclusively from people: family, friends, neighbours and people at the church where I was very active. All were models for me, some of whom are still part of my life and I have long since left the community in which I grew up. As a child, people were my life."

Handling Difficult Situations

In difficult situations, Sarah exhibits the same stalwart determination to get through things that her mother possessed: "I become very stoic. When my mother became ill, she tried to behave as if she wasn't sick and she did that very well. When she died, I was surprised of course. You don't think that can happen when you're very young. It was a
huge funeral. Endless days at the funeral home and all that goes with it and I was right there through the whole thing. It was surrealistic, really. One day, six months later, I totally broke down while at our summer cottage. All of a sudden it hit me and I finally cried. It was a really cathartic time. When my mother died and with all the events surrounding it, some kind of strength kept me going or perhaps, simple denial kept me from dealing with it. So I really started dealing with it six months after her death.

"When I'm in a great deal of pain, whether it's mental, emotional or physical, I can get really focussed and deal with it. I respond to difficulties by knuckling down to figure out how I am going to deal with it. I have this stalwart determination that I think I was born with and I think people see that in me."

Career Development

Mentors

Throughout her career, Sarah has had a variety of mentors, the first of whom were managers within the organization: "My first two bosses knew each other very well and in fact, sort of passed me from one to the other. I now realize they really took me on as a protégé. There is no question of that in my mind. And I've always been fortunate to have people that I've worked for who were good role models in terms of thinking about the bigger picture. They let me figure out for myself how to do things that were my responsibility, yet they were always there if I needed them.

"I also developed relationships with other women executives which I've found to be very helpful. When I became an Executive Director, I was the one of the first few women in fifty years to hold such a high-ranking position in the voluntary sector. I'm talking about large enterprises with budgets over forty million dollars. Then suddenly, there were several women in similar type positions and I sought them out. We started to have dinner meetings
every month or so and we talked about everything. We were very open with each other because we knew that we were changing this business. So, that was a different kind of mentoring. It was more of a collegial thing."

At times, Sarah has also sought out volunteers who sit on the Board of Directors as well as other associates: "Again, it’s another variation on the mentoring theme because volunteers in this business are your bosses and I used them in a different kind of way. And two or three other people who are employed in slightly different businesses within the voluntary sector have also been helpful, consultants and friends whom I would call mentors because they are people who will say to me, ‘You know, Sarah, this is what I’m observing about you these days as we talk about things.’ They are people whose opinions I respect and whose experiences enhance mine. Although it’s not mentoring in the traditional sense, I would still call it that. And, although I’ve never accessed it, I am intrigued by executive coaching which appears to be another form of mentoring."

**Significant Experience**

In terms of early work experience, Sarah believes that the three years she spent in policy analysis with the government were extremely valuable for the work she does today: "I never saw the job I took in home support services as something I wanted to do for a long time. So, when a position as a policy analyst with the government came along, I applied for it. It was an interesting job from a couple of perspectives. I was hired because they felt it was important to have someone on staff who knew what went on in the trenches. However, since all my peers had worked in policy analysis for a long time, it always felt to me I was the token social worker in a social policy department. But what I learned there had enormous effects for me. The person who headed up the department was a brilliant man in matters of policy. So I learned how policies are developed and framed as well as how government works and how decisions are made. That has proved invaluable for the work
that I do."

Gender Issues

Sarah pointed out that although people often thought that women dominated the voluntary sector, senior executive positions were the domain of men: "There was very much a glass ceiling that needed to be broken. It was fine to be a secretary but you couldn't be the boss. When I became the executive director I was breaking new ground.

"When I'm invited to speak to groups of women or participate on panels, I often hear women talk about how they have had to endure terrible hardships, had to fight or scratch their way to the top or how they had to aggressively assert themselves to get anywhere at all. In these forums, when I'm asked about why I have been so successful, I usually tell them my theory: I work hard. I'm very responsible and responsive. I am also very reliable. I built myself a good solid reputation and I've built on it over the years. Yes, all those things are true. But, I was also lucky enough to be born in Canada and not Bangladesh or someplace like that. I was born when I was. Maybe if I had been born a few years earlier, my situation might have been different. I happened to be born at a time when the values of society were changing. When I look at people who are a few years older than I am, I notice that I share the same sorts of values and philosophy of life as they do. And yet, I understand the view of those who are a bit younger than I am who feel that life owes them something. So, I was born at a time that sort of puts me right in the middle of it. I think it's a good spot to be in because I can identify with both sides.

"I was also privileged enough that I didn't have to worry too much about financial matters, although I had to work like most students to pay for my university education. And I bought real estate in Toronto in the late seventies. Now all those things coming together are a recipe for success, whether you are a man or a woman. So, I believe that it's a combination of hard work, good management and luck. And its important to say that
because some people haven't been as lucky. I'm only going to take so much of the credit for my success."

**Balancing of Roles**

"I've had a reasonable balance between my work and personal life, although I don't think I did it all that well. I rationalize it by thinking that business has changed and demands are different these days. But the fact is I have probably committed myself more to business than I have to family. Although I think I've got a reasonable balance, I wish I could have a different kind of a balance. I think everyone struggles with that. I don't think that I'm unusual in that.

"In today's business environment, it is important that one nurture familial relationships as well as establish and maintain friendships. If you are going to be able to devote yourself to the demands of an executive position and if you're going to do that successfully and stay a well-balanced person, you have to have the nurturing elsewhere. And that comes from family and friends. So, you have to keep cultivating that as well. You can never cultivate enough of it but it's a question of time and priorities. I don't think you get to a senior executive position anymore without having a very strong sense of responsibility to your business and to your family. I think that's the difficulty so many of us find ourselves in. You do the best you can with the balance, but you never quite make it.

"Had the balance been tipped toward the personal rather than the professional, I probably would not be where I am today. You have to have a certain drive and focus and there just aren't enough hours in the day to do it all. If anything, my own physical health has suffered somewhat because I have pushed myself to do more of both of them than maybe was healthy. And I've not enjoyed as many things as I might have if the balance had been tipped more to the personal than to the professional but I don't think it was ever a big conflict."
Career Success

"One's success is a sum of a number of things, one of which is getting a variety of experiences early in one's career. I spent three years travelling the world when I was in my late twenties. I would say that when you're that age, a woman, travelling by yourself in pretty remote areas of the world, without any money, and you have a good time, make a go of it, absorb the culture, and so on and so forth, I guess in the end, you figure you can do anything.

"It's also really important to move around, but it must be harder today to let go when jobs are not as plentiful. In the early years of my career, I knew I needed to move around and I did. But I will admit that I didn't do it in any planful way. The only time I did anything in a planful way was when I was applying for a job and trying to convince the prospective employer. Then, what I had done was all part of a grand plan! So I think part of my success is due to a combination of good luck and getting a variety of experiences early in my career."

Appointment as CEO

Sarah didn't jump at the chance to become CEO. They had to offer the position to her twice: "I had been working at the provincial level for a number of years, was enjoying it and feeling very comfortable being there. I was also involved in a major restructuring of a division and it was a major downsizing and very tricky stuff. There was just no way I could or wanted to leave it. I wanted to see things through to completion. Also, having worked in two multi-level large charitable organizations, I knew the rewards were different at this level and I would be further from where the services are delivered. So, although the board had hoped I would be a candidate and was encouraging me to compete for it, I decided that with all that was going on, I decided not to.

"However, after the process was completed, the person who was going to be hired
withdrew which initiated the process again. By this time, about a year had passed, and there was window that had opened at that point, and I began to think, 'Every job has a life span so maybe its time to think about moving on to something else anyway. Here you have something that is ready-made, where you can build on what you've got already.' I also believed that I was the right person to do some of the things that I understood needed to be done and the work would be an interesting challenge. So I finally reconsidered because a position of this status doesn't come along very often. But I didn't want the appointment to be one of convenience. I wanted to compete for it. So they had a competition, I entered it, and won the job.

"I was really quite excited at the opportunity to have a chance to further my own horizons while continuing to build on the work that I had done in the previous six or seven years. Because of the structure of this organization, accepting the position meant I would be exposed to a brand new environment—that of the scientific world. I knew a fair bit about one part of the work and had only a superficial knowledge of the other so it was a new horizon to explore. I felt really quite fortunate."

**Future Aspirations**

Sarah has just signed another three-year contract which means she will have been in her position as CEO for eight years. "Eight years is often too many but it will be about right in this case because I have about three years of work that I still want to do and I think I still have the energy to do it. My aspiration is then to semi-retire, although that may be too strong a word. I plan to get out of senior level management. I'll be in my mid-fifties at that point. I think it's time. I don't have aspirations to move further up simply because there is no place to go. I'm not sure what I'm going to do. I hope that I can position myself to do something entirely different but something that will be a lot less stressful. I've proven that I can do this. It gets to the point when you know it's time to move on. There's a law of
diminishing returns. I don't need to prove anything anymore except that I can be happy, keep a roof over my head and hopefully, do some things that will help other people.

"I would like to do more for my community because the demands of my work has meant that this aspect of my life has diminished in recent years. There are some things that I need to do for me. I would like to do volunteer work that is directly related to people. I have missed this. I struggled for a while with this issue and I stopped doing any direct volunteer work at all. Now what I do is sit on boards which isn't the same. I would like to do some volunteer work in the community that doesn't feel like it's an extension of my professional work."
Keith

"By the age of eight I could read people very well and was able to size up a situation. And, what I've basically done is to take that intuitive ability and just grow it and roll it into bigger scenarios."

General Background

Keith is in his early forties and is married with a young family. By the time he was eighteen, he was working as a volunteer in positions where he acquired the skills to teach and to effectively deal with people. While in the third year of his undergraduate degree, Keith accepted a full-time position with the Y to run its aquatics programs. A year later he resigned to become the Aquatics Director for the Parks and Recreation Department of a major city in Ontario. His success in this position resulted in being recruited by an executive placement firm for a vacancy in a middle management position in large charitable organization. After serving in this capacity for a period of six years, he was offered a position as a Regional Executive Director. Although Keith had some concern that he was getting typed cast in a particular job environment, he accepted the position because he felt that it offered him the opportunity for advancement to the more senior positions he wished to hold. Three years later, he resigned to become the Executive Director and CEO of a national charitable organization.

Home Environment

Keith was born and raised in Western Europe. When he was eight years old, his father, a Captain in the Signal Corps, retired after serving for twenty years. Because Keith's father had lied about his age when he enlisted, he was only thirty-five years old when he retired. Wanting to relocate so that his children would have a greater chance at succeeding vocationally, he began talking with people in Canada on his ham radio. Consequently, he became a radio buddy with an employee of the Department of National Defence. He was
told that with his leadership skills and his knowledge of electronics, he was a natural for the Canadian Industries sector, which at that time was involved with technology for guidance systems and the building of the Arrow aircraft. Deciding to take the risk, Keith's father immigrated to Canada. He obtained employment with a large manufacturing firm and six months later brought his family to Canada. He subsequently resigned to take a position with a company that manufactured computing devices and he rose to the level of a Vice-President before the organization was involved in a merger and he was laid off."

Keith is the second oldest of four children. He has one sister who is a year and a half older and two younger brothers, one of which is about a year younger and the other, eighteen years younger.

"My mother was in her mid-forties and she wasn't supposed to be able to have any more children because of the damage that had been done during the last birth," remarked Keith. "Some eighteen years later, she had another baby. Quite a surprise! Since my room was next to his, when he cried at night, I got up and looked after him. I enjoyed doing that and it gave my mother a chance to sort of rest or sleep in. I got to do a lot of the fatherly things that you do with a young child, which I'm doing now. Strange, how things go around full circle. It was great having somebody that young around the house, and at that age, watching how a child develops. He was in my life for about two years and then the family moved to Quebec since my father found a new job there and I was off to university.

"I maintained a healthy, strong relationship with him until he was sixteen and my father died. Then he sort of viewed me as a father and I never envisioned myself in that role. The relationship changed because he expected me to put rules and regulations on him. By this time, my parents were living in southwestern Ontario and I was working in Toronto. So, it wasn't an interest of mine to do this nor did I have the ability to do it.

"I don't remember a lot about my father before we immigrated to Canada since he
was away a lot of the time. What I recall are those times when we had fun together, when we would go down to the beaches and swim. I also remember the routines and regulations that he set up for the times when he was absent. My mother used to put matchsticks into matchboxes when any of us misbehaved so that when my father came home, he would look at how many matchsticks were in the matchboxes and he would have a progress report on how well we were behaving. It was his way of influencing discipline while he wasn't there. He would come home every second weekend for sure and I'm quite sure that he wasn't away every weekend.

"We probably had a better relationship when we came to Canada, when he wasn't travelling as much. And of course, I was a young boy when we lived in Europe. I think he was more comfortable with an older child, somebody he could talk to or take fishing with him. As we went through our teens, the cottage became a focal point of the family and on weekends, we would go up to the cottage. We cleared the land and built the beaches together so it became sort of a working/bonding relationship.

"What I remember most from the time we lived in Europe was the environments in which I lived—where the houses were, walking to school and that sort of thing. We moved three times before immigrating to Canada. I was too young to remember the first move but my parents used to live in the country and they moved to a place that was close to where my mother had lived. We then moved to another home in that same community before moving to a place which was located very close to where my father's mother lived.

"When we lived there, a neighbour who became a very close friend of the family took an interest in me. He would take me for walks with his dogs in the fields behind our house and he would tell me stories of how bald eagles would come down and swoop up lambs. He took me to see Moby Dick when it came out the first time and to a war movie. I remember the aircraft dive bombing a train and the whole experience of lights. At that time,
I would have been six or seven years of age and a pretty impressionable kid. We became very close friends. He didn't have a family. So, he sort of took an interest in us as kids and looked after my mother when my father was away.

"I also enjoyed playing with my friends in the fields in the back of that house. There were big fields and there was a small little mountain, about the size of the mountain at Collingwood. We would run up and down through the fields, up the mountain, down the other side to the cove and then go swimming. When we did this, we would be pursuing each other, hiding from each other, forming little teams, sort of conquerors and victims, depending on which side you were on. Sometimes we would get engaged with older kids. Although I was the youngest guy, I designed the strategy to capture these other guys. I prided myself in being able to defeat them, although they didn't always take defeat kindly and we would often have to run for our own safety. I always looked forward to playing in the fields because they were times when we had a lot of fun.

"Some of my cousins who lived in the area would be part of that group as well. I remember beating up one of them because he would tattle on us to my grandmother. Now my grandmother was really the matriarch of my father's family and had a powerful influence over my father and my uncles. She was very much a fear monger and was very abusive in terms of intimidating people. So, she wasn't well liked. I remember this cousin would always go and tattle to her about what we'd done and he and I would get into some difference of opinion about how to solve it. I certainly wouldn't take a put down without a challenge."

Because his father was away for extensive periods, Keith took an active role in looking after his mother: "As a child, I became my mother's protector. I began as a young guy and I've continued to do so throughout her whole life. Whenever she's been in difficulty, I've always been there to help her. Even when my father passed away, I was at
her side and helped her through that transition because her lifestyle was typical of the culture in which she was brought up. She never had a bank account, never got to drive a car, and never had any money of her own. Certainly, it was one of the ways my father satisfied his need for power by creating those dependencies. So, I was her lifeline or saving grace. I gave her comfort and looked out for her interests. Whenever, she was in trouble she could always talk to me.

"My father was never violent with my mother, but emotionally, he would prey upon people that were susceptible to allow themselves to be intimidated. And that came from his mother. There's no question about that. He learned from a master and of course, the military encouraged that even more with their style of leadership being primarily one of intimidation."

**Influence of Parents**

Keith attributes his ability to lead and manage people to the influence of his parents: "My father's style of parenting was leadership focussed and disciplined centered. He was not a person to whom one could easily relate because he did not spend a lot of time on the emotional side of his communication. He was very direct in a dictatorial, authoritarian way. With his military background, when he asked you to do something, he expected you to do it. And when he asked you, he wasn't very polite. On the other hand, my mother was extremely sensitive to people's needs. From her, I learned the strength of being people-centred. Since she was the opposite of my father, I had a good balance between them."

**Moving to Canada**

Canada was quite a cultural shock for Keith when he arrived. His father met them in Quebec City and they drove from there to Burlington. "That's a fair drive across Canada. Here I was, a young guy, looking at Canada through the window of a car. Coming down the St. Lawrence, I could see how big the country was. There were very few houses along the
way and all those trees! The whole environment was new. It was exciting.

"I was coming from a developing country and Canada had a very fast economy when we arrived here near the end of the fifties. It probably didn't know what a deficit was. In Canada, we had a car; we didn't have one in Europe. We had a TV set when we arrived in Canada; we didn't have one back there. We always wore shorts; in Canada, everybody wore long pants. I noticed that the people here tended to be less open, less friendly, more reserved. You really had to sort of develop some level of trust with them before they became more natural. And the kids seemed to be a little more adversarial and combative. Maybe, that was the influence of television. Playing cowboys and Indians was a big thing in Canada; it wasn't where I came from."

**Education**

Keith was educated in both Europe and Canada. His highest grades after emigrating were achieved in mathematics and science and his lowest marks were in languages. Keith attributes this variation to his early education in Europe: "Although everyone spoke English, it was not the first language you learned to read and write. Comparatively speaking, it would be like living in Quebec where you learn French first. When I came to Canada, I was put into grade three with very little knowledge of written English. So I was three years behind most of the students in language skills. However, I was ahead of them in mathematics. For a long time, I was always behind in my language skills but eventually I did catch up.

"Actually, learning to read was one of the more negative experiences I encountered after arriving in Canada. The educational system was still very much focussed on outputs rather than outcomes and teachers were concerned about how well you could spell and read rather than how much you enjoyed spelling and reading. Thus, they tended to
emphasize your failures rather than your successes. At the time, teachers were using phonics to teach students how to read and they were getting frustrated with me because I was having such difficulty learning to read. Somehow, I found that the fastest way I could learn to read was to memorize the words and forget about the phonics. So I did that and it got me out of that negative situation much more quickly than I would have, had I continued to use only phonics.”

When Keith began attending high school, he had little time to be involved in activities outside of classes: "Our high school was five or six miles from our house and I used to walk it. By the time I got there or by the time I got home, there was very little time to get involved in extra curricular activities. And then, when I was old enough to have a car, I was active with two national organizations as a volunteer so that I was getting my leadership fulfilment in that area. I also tended to be the silent lone ranger in high school because I was more interested in acquiring an education. However, I would take leadership when the issue involved an individual's rights. When somebody was being put down, I would often step in. I was known for my role as a peacemaker and as a protector of kids who were not likely to defend themselves. People wouldn't challenge me because they knew I was strong enough to stand up for himself.

"A couple of teachers tended to belittle students and I recall challenging them by making a comment that would take the tension off the individual and shift it to me. And from my comment, they knew exactly what they were doing and I was doing. Of course I was in deep shit afterwards but it accomplished what I wanted to do."

Because of Keith's involvement in volunteer activities during his senior years of high school, he had the rather unique experience at that age of teaching others while at the same time being a student: "I found that by grades eleven and twelve I was critical of the way I was being taught. As I recall, I had one good teacher in high school and he did very
little teaching in the traditional manner. What he did was to set up an environment where students could succeed at their own rate of interest. And, I succeeded very well. I was the top math student throughout high school. But as I looked at how other teachers taught, I saw them more as editors of information which they'd pass on to the student. There was little interaction between teacher and student and when I went to university, there was even less."

With his goal to become a geologist, Keith pursued a Bachelor of Science degree at university: "I enjoyed the outdoors. And geology is a field where I could combine my love of the outdoors with one of my other strengths, which is science. I also had plans to teach earth science courses because I enjoyed teaching. However, I kept being promoted to higher levels of responsibility in my part-time jobs and when the Y offered me a job to run their aquatics programme on a full-time basis in another city, I thought, 'Well I'm doing more in this area than I'm actually enjoying in terms of my studies. So, I'll take this opportunity.'

"I did finish my third year at university and although I've always wanted to go back, there's been no incentive. Completing the degree for the purpose of being able to say that I have a BSc in Geology hasn't been enough of a motivator to go back and pursue it."

While at university, Keith became interested in computer technology and has used it effectively in work that he has done: "While taking a computer science course, I realized just how influential this technology would be on the way businesses would operate. I enjoyed using it and it interested me. At that time I was operating an IBM 360, the machine that read cards with holes punched in them. So, when businesses started to use computers, the technology or its potential certainly did not baffle me. I enhanced the management processes in one organization by computerizing many of the functions that the staff were doing manually."
Continuous Learning

Asking questions is one of Keith's primary methods of learning: "As a child, I always liked to ask questions. I never took anything at its face value. If somebody said this, I'd say, 'Let's look at it from a different direction.' And as a kid, this used to infuriate the teachers. But I didn't do it as a game. I did it because I had an inquisitive nature, a curious nature. I always wanted to know why and I wouldn't accept the simple answer. That's why my interest in the sciences is so strong."

And, this fondness for asking questions and challenging the status quo has played a significant role in Keith's success as an executive. By gaining an understanding of the processes, the politics of the organization and the motivation of some of its key people early in the process, he has saved organizations time and resources. In one instance, he completely changed a massive program of a very large non-profit organization within a year so that the credibility of its programs was restored.

Keith also likes to learn from those around him: "I couldn't match in any university program the experience and the education I have acquired from people who work as volunteers. Every time I've done a strategic plan, I bring in volunteer consultants who earn hundreds of thousands of dollars but are willing to work for me for nothing. I've had CAs as treasurers who had lobbied for their own businesses or were employed by large accounting firms. When I was thirty, I didn't know what a financial statement or balance sheet was because I had no accounting background. But as I worked with all these people, I just kept asking questions like 'Why?', 'Why do you do it this way?', 'What's the benefit?' And by doing that, I learned a lot about finances. You bump into these folks and you learn from them. They become your instructors and because you're faced with a challenge, you're very eager to learn. How do you create and build a new program? How do you market it and how do you test it? And you learn all those things from experts who have done it
successfully. "I'm ripe as a sponge. I just shamelessly steal people's ideas."

Keith also learns from the mistakes of others: "I was able to restructure one organization in about a third of the time that another organization in which I had worked took to restructure. The reason: I learned from them what you shouldn't do when you are restructuring and I didn't repeat their mistakes."

**Summer Employment, Volunteer Work and Career Direction**

**Summer Employment**

In order to earn the funds that he required to go to university, Keith worked at three different jobs after graduating from high school: "I began the summer by building roof trusses in a roof truss factory. The work was physically demanding and it was an interesting experience. I got to interact with people who were doing this work for a long time and I began to be concerned that if I didn't keep moving, I would end up in a place like this for life. The same summer I was employed by a construction firm to clear bush for a trailer park that was being built. The employer wanted someone who was experienced in using an axe and a chain saw. Since I had that experience as a result of helping to clear bush for the family cottage, I got the job. When that project finished at the end of June, I went on to be a counsellor at a camp for disadvantaged youth for the rest of the summer.

"Most of the campers came from downtown Montreal and were no longer living with their parents. A significant number of them were living in reform environments and were being sent to the camp so that they could have some fun. They were a challenging group of kids. Some of them had witnessed other children jumping off three or four story buildings. Others had watched friends drink a can of turpentine after double-daring each other. One child had actually watched a kid hammer nails into another child's hands. They were a rough group of kids. But I enjoyed them because we were able to build a family. I had
about eight of them and I had a great time establishing a rapport with them. The crowning experience was when we went on a short over-night canoe trip with campers from four or five of the other cabins. When the weather turned foul, the campers from the other cabins headed back but my guys decided they were going to stay. So, they sorted through the food, decided what could be used, and came up with a plan for survival. They had a great time. I remember when we got back, the camp director was really surprised that this group of misfits had actually stuck it out and enjoyed the experience. He saw some new potential in them. The camping experience took them out of an environment that was actually creating their negative behaviour and put them in an environment where they were basically being reinforced with their own ability to get along. I learned a great deal about communication, leadership and teaching skills by being a counsellor at that camp.

Volunteer Experience in Aquatics

While at that camp, Keith took on the role of a swimming instructor, a role which was to have a significant impact upon his career: "The way the waterfront director determined whether you would work on the waterfront was to have staff line up on the dock, dive in and swim to the other side of a roped-in area. The first six or seven people who got to the other side became instructors and lifeguards. I was the first to get to the other side so I became one of his instructors and I learned how to supervise the waterfront. When I came back home that fall, I enrolled in a lifeguard program to get some certification so I could do it in a more proficient manner. I went on to be certified as an instructor and an instructor trainer, where I got involved in teaching people how to teach others. So by the time I was eighteen, I was teaching adults how to swim at the local Y. Because water is such a fearful environment, I learned a lot about people in that job. I learned how to understand them and I gained the ability to influence people so that they achieve success. That has really carried on throughout my whole life. As I became a manager and then a director, I took that basic
skill set and that ability to help people succeed and kept adding to it. But my success in these roles relates back to this early exposure to leadership that I had at a young age, something that most young people of seventeen or eighteen years of age don't get. I learned a lot about people, developed self-confidence skills and I don't think I set up as many paradigms about people's behaviour because of this experience. I also learned a lot of people skills by experiencing them first hand."

Having been certified as a YMCA Red Cross Royal Life Instructor and Lifeguard, Keith worked during the school year on a part-time basis as an aquatic supervisor. During the next two summers, he was the summer aquatics director for the local Y: "It was an opportunity to use some of the skills I had learned. I built a team of seventy volunteer instructors and since we were all about the same age, there was a lot of socializing going on and I made some new friends. It was a really good group of people and we had a great time together. The experience really helped to enhance my social skills development."

While working at the Y, Keith asked a Red Cross instructor-trainer, whom he knew very well, if he could help mark practice teaching sessions. And, he was given the job. So, not only was Keith getting experience in marking instructors but he was also able to identify those instructors he wanted to recruit to work with him at the Y. The following summer, he was employed by the Red Cross as an area supervisor to visit various sites to help staff acquire the necessary skill sets to operate their programs more effectively. At the same time, he was also Chairman of the Red Cross Water Safety Program in his hometown.

Keith remarked that he has always believed in the value of being a volunteer and since the age of seventeen, he has been involved with various agencies. For his work with the Red Cross, he won the Red Cross Merit Award for Distinguished Service.

Full Time Aquatics Experience

When Keith was considering leaving university to take the full-time position as an
Aquatics Director, his family was experiencing a difficult time: "It was at this time when my father lost his job in a merger. So it was an unstable period. I felt, should the family require it, I could then contribute financially to it. I never had to do that because my father found employment but it was one of the reasons to leave university and take the job with the Y.

"And I think I looked at the Y where I was working and saw that it was moving away from the strong volunteer environment I had created. It was merging with the Y downtown and in that merger, the development, the recognition and the value of the volunteer to the organization were losing their priority. I could see that people weren't as interested in the volunteer programs that we had developed at our location. I also felt strongly motivated to accept the position because I saw it as an opportunity to get out of the comfort zone of an environment in which I was familiar and to see whether I could duplicate what I had created in another location. And I did create the same environment there and I did it very quickly. Also, the people I met while in that job were really very positive leader-supportive role models. The general manager was an extremely positive influence. He had been around the Y for a long time and modelled very well the values in which I had an interest. So did the Director of Physical Education. He is one person that I still hold as a model of effective leadership. So there was a very natural cultural fit there."

Personal Characteristics

Interests and Hobbies

Keith has always loved the outdoors and especially enjoyed his summers at the cottage: "As a group of cottage kids, a lot of our focus was on fishing. We would take our fishing rods and we'd take out a map and say, 'OK, lets see if we can find this lake.' And we would go and find some trails that would get us to that lake. Once we got there, if it was a good fishing spot, then we'd come back and get our canoe and portage it. Other times,
we'd take long walks in the bush where there were no trails and we would find the lake with just a compass. On occasion, that left us only half an hour to fish and get back before night fell. We'd often wonder if we could find our way back while there was still daylight. I spent a lot of time on the adventure side of things, sort of like Huckleberry Finn. I really enjoyed the process of discovery in itself as well as discovering the beauty and the challenges that nature offers. I also enjoyed the comradeship of the people that were around me and sharing those kinds of experiences with them."

Keith also enjoyed camping, canoeing and sailing. In school, his interests were predominately focussed in basketball and swimming. "My father was a champion diver and swimmer and he taught us how to swim very early in life. By the time we were five or six, all of us were very competent swimmers."

In addition to his interest in outdoor activities, Keith did some reading as a child. "I enjoyed the cartoon books of Rupert the bear, who was a popular character in Europe. Reading through those books was something we always did as kids. And of course, when I came to Canada, reading was such a negative experience. Why would you want to put yourself through that when you could turn on a TV set and watch Hopalong Cassidy, Superman and all that stuff?"

**Self-Confidence**

Keith possesses a high degree of self-confidence. He remarked that it probably dates back to his early childhood when his father put him in situations that were extremely challenging: "I learned how to swim in sea conditions into which most people would never venture. From those experiences, I learned how to be successful, to fight the elements and I gained self-confidence. Teaching adults how to swim added to it. On one occasion, I taught a seventy-eight year old woman how to swim in seven weeks. She was so fearful that her first lesson started in the shower. By the end of seven lessons, she was having fun
in the deep water. We built a very strong relationship."

And, Keith's self-confidence in his ability to effect change has played a significant role in the success he has achieved: "I knew you really make your decisions early in this game. If you wait too long, people will start to position and one's lack of confidence will become evident. I say, watch people who start in a job. One type will start a job and in six months, they will have done nothing. That way they don't get criticized. The other type will start in a job and do something. I tend to be of the latter group. If I've been in a job six months, I will have already created some change and some development. If it is not going to work, then I know and so does the organization."

"Also, some people will hire down because they feel insecure. I always go in the opposite direction. I always hire up. I always hire up in the sense of bringing someone on board who has more ability in certain areas than I have. So, every time I hire a new director, I'm learning from that person. I am comfortable hiring someone who brings to the organization a set of skills and knowledge that I don't have. That way I can grow."

**Thinking Intuitively**

"As I look back on my career, probably as early as my late teens and certainly before I took the Director of Aquatics job, I learned the importance of intuition. And nine times out of ten my intuitive ability to know how to deal with a person is right. I am almost able to second-guess a person's sense of what they are going to do next. To know you have this strength and gift, and I believe it is a gift, has built up my confidence. Recognizing that I had this ability to understand people, to understand what motivates them and to understand how to achieve results through them was probably the single most important personal realization that I came to at a very young age. Certainly, by the age of eight I could read people very well and was able to size up a situation. And what I've basically done is to take that intuitive ability and just grow it and roll it into bigger scenarios."
Thinking Strategically

Another of Keith's strengths is his ability to think strategically and to successfully implement his ideas. On a number of occasions, he has had to deal with issues that involved internal politics, opposing management philosophies and centralization and decentralization of organizational structures.

The first time he was involved in these types of problems occurred when he was an aquatic director. In this position, he was responsible for the operations of eight indoor pools, three civic beaches and fifty-nine park sites with overall responsibility for almost thirty full-time staff and five hundred part-time staff.

"I was twenty-three at the time and I think I was the youngest guy on the full-time staff. All the other folks were ten or twenty years older than I was. For a young guy, it was a significant responsibility and I saw it as a vote of confidence from my boss that he had trusted me to do the job. I remember that after the interview, he told me that he had liked that I had talked about the need to break down the centralization that had been put in place.

"Since at one time I had been one of the instructors in the pool, I had seen that people were being prevented from being successful in their jobs because they no longer had any power. I had watched them and saw the type of environment they were working in and I could relate to them. They were told what to do and when to do it. And, if they didn't do it, there were consequences. It was an autocratic environment, very much a military style of operation and it was not surprising as the Director of Recreation at the time was from the military.

"So I decentralized the operation and engaged people in the decision making process. As a consequence, we had the strongest aquatics program in Ontario. A lot of what I implemented, I had learned from my experience in the Y because the work of the Y was very much focussed on strengthening individual character and valuing the individual in
the process."

A second example that illustrates Keith's proclivity to think strategically occurred when he was the Regional Director for a large not-for-profit charitable organization: "What I did was to take the national campaign to raise money to build corporate headquarters and suggest that in our region we run six community campaigns instead. I believed that by running six side-by-side campaigns, there should be more money raised to build the national headquarters because more people would be involved in running six campaigns as opposed to one.

"At the time, I had no idea whether my plan would work. I just decided that if you want people in the community to give money for a capital campaign, it's not going to work unless they see some capital being reinvested in the communities. So, I convinced the powers to be that I'd like to take this campaign and call it side-by-side in my area and to invest the money equally in the community and the corporate headquarters. And what happened was all six campaigns were successful and others regions followed suit. It became the general strategy for the whole organization."

"And my current job could have been a very negative experience because the organization was going through what I call typical governance meddling. The board was comprised of an executive and senior staff. And, the executive was constantly into the day to day operations. Therefore, no executive director had lasted more than a year and a half to two years on the job because this conflict was going on all the time. So when they hired me, as part of the interview process, I asked them clearly, what they wanted of me and I described what I wanted of them.

"At the first executive meeting which was four weeks into the job, I presented a reorganization of staff at the national office. And when I presented it, I prefaced it by saying, 'The way you receive this information will tell me exactly how you want me to
manage the organization.' And the board chairman knew exactly what I was doing. He said, 'What do you mean, Keith?' And I said, 'Well, if you receive this as information, it means one thing. If you receive this and want to give it your approval, then it tells me another thing.' He said, 'You mean, if this is information, this is your job and if we want to approve this, we haven't let go.' Exactly,' I said 'I want to know now because I do not want to spend the next six months fighting you guys over a lack of understanding about who is managing this organization from the operations side.' In about thirty seconds, they said, 'It's your responsibility.' And that's when they let go. But I had to do it early in the process or I would have become a casualty again of allowing volunteer governors to get involved in the day to day operation."

Thinking Bi-Laterally

Keith remarked that his ability to think bi-laterally has also been a key factor in his success: "I'm ambidextrous. I can use the right or left hand equally well, though it can be confusing at times. I remember when playing baseball, sometimes I'd have to figure out which way I wanted to bat, left or right. But I think this ability carries over to how I think about people and situations. I function equally well from both the emotional and the analytical perspectives."

Need for Change

Keith thrives on change. Hanging on the walls of his office on the days I interviewed him were a number of charts, one of which was a model for change that he had learned at the Banff School of Leadership. In our discussions, he referred to it on several occasions. "Even as a camp counsellor," he remarked, "I was always wondering how we could make things different."

Leadership and People Management

As noted, Keith believes a leader or manager is responsible for setting a framework
in which people can be successful in their job: "I believe everyone wants to be successful. I don't think there is anybody in a job that doesn't want to be successful. It's what we do to that individual in the job that determines whether or not they will be successful. I learned very early in life that teaching and effective leadership are very, very similar. If you are a good teacher, you set up a framework for success. If you are a good manager, you do the same. I enjoy watching people succeed.

"However, when people fail, relationships deteriorate or people systems break down, it's because people have become engaged in other agendas, specifically, their own power agendas. I've been around and have seen enough power agendas to know that when people start becoming interested in the power, they become less interested in the people and they become less valuable to me in the organization. That typically happens when people have been in a job for five or six years. Unless they continue to grow the job as experientially as they can, they start to get involved in the politics of how to gain more control. Since I am responsible for the culture of the organization, as soon as people start getting into the politics of organizations and trying to drag me back to where we were in the past, they have a very limited life in any organization that I manage."

**Handling Successes**

Keith's successes tend to be centered on those achievements that involve people: "When I look at the good things, I usually find they are centered around people, not around things. So, celebrations last a long time because I celebrate with people. For example, one of my mentors and I have gone through a number of celebrations together and a few years ago, when I got married, he was my best man. And becoming the CEO of this organization was a celebration from the perspective that I can influence more people in a more direct way and cause a bigger difference than the one-on-one difference I would have made as a teacher."
Handling Failure and Disappointments

Keith does not fear failure: “Early in my life, I learned how to overcome the notion of failure by analyzing the situation. When I was having problems learning to read and the teachers were putting me down, I soon learned to turn that around. I began thinking it was really not my problem. The teachers had set the agenda. They were the ones who were feeling frustrated because I was not meeting it. I coped with the situation but I rationalized very quickly that this was their problem, not mine.”

“And when I was very young, I learned the power of controlling my emotional responses. My father would often try to intimidate me by instilling fear, the way officers learn to do in the army. But I learned not to respond on an emotional level. I wouldn’t get upset. I wouldn’t get angry and I didn’t give him the emotional response that he needed to gain power over me. And this really pissed him off to no end.”

“And I still use this style of response when I’m in situations where others are apt to react with strong emotion. Although I may feel strongly about an issue or be disappointed or sensitive about a situation, I try to deal with it in a logical, clinical manner. Likewise, when it comes to dealing with failures or disappointments, I deal with them in a very analytical and detached manner. I think that’s part of the reason why I have been successful. Basically, I have the ability to move well on the people agenda and then deal with adversity with the logical, scientific, mathematical side of me.”

Managing Stress

Keith loves activity. He thrives on it: “Around this office, there is never a dull moment in the day. You can always choose between five or six things to do. The important part is that I’ve got a choice. That makes handling it easy. It’s when you don’t have the choices that it becomes stressful. So I try to make sure I have as much choice as possible over whatever is happening at any particular time. That way, I can manage the stress.”
Balancing of Roles

Probably the biggest challenge Keith now faces is managing the balance between his role as a CEO and his role as a husband and father. Up until three years ago, Keith was a bachelor and his personal life was largely devoted to recreational interests.

"I didn't really have to commit to any strong personal relationships. My commitments were to the job. I could work as many hours as I wanted and as long as I wanted. It was my choice. When I worked long hours, it was because I wanted to achieve X or Y and that was the way I could do it. Now I find I don't have the choice.

"When I got married, I didn't think things would change that much. But I've found that wasn't true. Suddenly, working weekends and evening work had to be negotiated. But, at least there was a point of discussion. Now that we have a child, there is no point of discussion. My daughter determines the agenda and she doesn't negotiate. By six o'clock, I have to be leaving here and I travel two weekends a month instead of three. The biggest struggle that I am now going through is trying to balance my corporate and personal life."

Career Development

Mentors

The most significant person to influence Keith's career was a university professor who worked for the Red Cross on a volunteer basis. When Keith became part of his training staff, they would go to various instructor schools and teach people how to teach: "I learned a lot about educational philosophy from him. I probably learned what others learn at a Ph.D. level about teaching adults. He was, by far, the strongest influence in my life. He taught me a lot about teaching and learning styles, presentation techniques, how to communicate in front of a group and how to relate to different types of people. I got it all at the age of eighteen from a master who was a very, very brilliant man."
"He certainly took a very active interest in me, saw my leadership abilities and made sure that I had an opportunity to develop them. I've often wondered as I ponder the decisions I've made in my life, if I had not met Ralph, would I have been able to realize all the opportunities that have come my way, because the mindset of a lot of people in the seventies was to get comfortable and get a job that would give you the opportunity for a good pension. Probably, I would have been comfortable being an aquatic director until I retired. And certainly, my hometown was a place where I could have stayed.

"Ralph and I have remained the very best of friends. He's now a volunteer for me and wants to be the president of this organization someday. So, we've reversed mentoring roles. As I've moved through my career, I've mentored him on a number of projects that have involved organizational change."

**Significant Experience**

About ten years ago, Keith was involved in the establishment and co-ordination of a major international disaster relief project. Within a period of twenty-four hours, he was seconded to deal with the aftermath of a hurricane: "It was a fantastic experience to be plucked out of one's environment and dropped into the aftermath of a hurricane to co-ordinate the relief efforts of different countries and nationalities. It was a total immersion. I call it the best situational leadership program that anybody could be exposed to. Here you are, you have to do something because this person needs shelter, this person needs water, this person needs clothing, and this person needs communication systems in place. And we needed supplies and a place to hold them. All that stuff was thrown at me. And originally, it was supposed to be only a two-week assignment. I was to go in, set up the relief effort and then after two weeks, start to deal with rehabilitation. But they kept me on for almost three months to help strengthen the rehabilitation program.

"Certainly, when you work one of those missions, it's a real cultural shock to be
dealing with human suffering on a one-on-one basis. And there's instant feedback. When you do something, it has an immediate effect. You don't have to wait for the financial statements to come through or see who's done what or who hasn't done what. After that experience, I was contemplating making international work my next career choice.

Unfortunately or fortunately, the headhunter recruiting for this organization snatched me out of that organization before I had the chance to make the next step to pursue international work as a more full-time occupation. I would have gone in that direction had the executive search company not been so forceful in having me send them my resume."

Appointment as CEO

"I knew I wanted to lead a national volunteer organization after sixteen years in executive positions. In fact, I had applied for a job out west when my girl friend at the time was moving to Vancouver and I wanted to continue the relationship. When the recruiters asked about career motivation, I remember telling them that my aspiration was to be a CEO of a major charity. At that time, I knew the region in which I was working could be doing better and I wanted to improve it. But obviously, people were in the way and I was not going to be able to do it.

"I didn't get that job in Vancouver because they gave it to the Chief Financial Officer. But seven months later, because of my involvement in applying for that position, I got this job. I remember the day I walked into this organization. It was just totally your worst nightmare in the sense of walking into a job. And because of the lack of leadership, people were very much intimidated by the changes that had gone on in the organization. Volunteers were hungry for somebody to take charge. The organization wanted to go.

"I knew that I had a tremendous challenge ahead of me and I've always been involved in an environment where somebody wants you to do something. You never walk into an organization where everything is running one hundred percent smoothly. Most of
the time they're running smoothly at about a twenty percent level and they're asking you to bring it up to eighty percent. So, that was the feeling when I walked in the first day and said 'Yes'.

"And we have done well. We've succeeded in what we set out to do. Strategic planning processes are in place. We have doubled our gross revenues in that period. Volunteers on the board now focus on the vision and providing leadership. The organization is living. When I started, it certainly wasn't."

**Future Aspirations**

Keith isn't sure what he is going to do in the future: "I've probably reached the height of my career in the non-profit sector. This organization is one of the leading charities in Canada. I would like to take this organization to the next plateau of achievement but I don't think I want to do this all over again for another charitable organization. I don't want to be a CEO for the next fifteen years of my life. I think if I'm a CEO for the next seven years, that will probably be the maximum length. I might do some consulting work, or maybe, I'll run a small marina restaurant somewhere—where I can establish relationships with people. More than likely, I'll move back to my roots and teach what I've learned through my work in organizations and help others to be successful."
Chapter 5

Analysis and Discussion

Introduction

The purpose of this study was to make explicit the factors which lead to the attainment of a position as CEO of a major corporation. To answer the research question, what are the determinants that lead to the attainment of a position as CEO of a major corporation, it is essential to define the constituent parts of the question to allow for valid analysis. CEOs of major corporations are classed in society as business elites. The American Heritage Dictionary (AHD, 1992) defines elites as "a group or class of persons or a member of such a class, enjoying superior intellectual, social, or economic status". Determinants, according to the AHD (1992), are "influencing elements or factors; antecedents." For the purposes of this research, the factors or determinants can be structured into two categories, those that are external to the individual and those that are internal. External factors considered include environmental agents such as socio-economic status, family, school, peer group, and significant others. The internal factors are those subsumed under the general descriptor of personality and include a person's interests, values, motivational needs, intelligence, and aptitudes. Self-concepts, self-esteem, and self-confidence are also factors that play a role in vocational success. For the purposes of analysis, external and internal factors will be discussed separately although most of the factors in each group do not function in isolation. Their effects are reciprocal: in other words, external agents have internal effects on the individual and vice-versa.

The phrase in the hypothesis, "that lead to the attainment", denotes process. According to the AHD (1992), the word lead means "to play a principal role in" and the word attain means "to gain an objective; to achieve; to arrive at, as by virtue of persistence or the
passage of time, to succeed in a directed effort, process, or progression." To assess this process, Super's (1957) developmental stages of vocational life was chosen as a framework for the purposes of analysis. Not only does it allow for an analysis of an individual’s career development over time, but Super's (1957, 1963, 1981, 1990) theoretical frameworks include constructs that converge with the psychodynamic model. These include the importance of the self-concept and personality in career decision-making, the role of external forces such as the family and other significant relationships in the shaping of one's career identity and development, and the impact of other life roles across the life span. As Brown and Watkins (1994) point out, developmental theories such as Super's address questions about normal personality development and the influence of personality at different stages in the career development process.

For the convenience of the reader and to avoid redundancy and repetition of material from the profiles, a number of matrixes have been prepared which summarize "snippets" of quotations and commentary relating to a number of themes. Appendix F contains material pertaining to the parents and relatives of the CEOs and Appendix G is a matrix that shows the influence of significant others upon their lives and career.

**The Growth Stage and Development of Self-Concepts**

During the growth stage, family, school, and friends have a significant impact upon the development of self concepts. Involvement in various roles and activities within these contexts provides an opportunity for children to assess what they enjoy and do well. Interests begin to develop that may lead to future careers (Super, 1957).

There is evidence to suggest that the family environments in which most of these CEOs grew up were generally positive. None of them reported their parents separating or divorcing. In fact, Paul described his home as one in which there were relatively few family arguments and contrary to what must have been the norm in the small town in which he
grew up, consumption of alcohol was not a problem. Dan commented that he never had any worry about having a home, support, and those kinds of issues.

In general, most CEOs found their parents to be supportive. In describing their parental relationships, a few of the CEOs used the words “felt loved” or “felt supported.” John described his home environment as one in which he was encouraged to take risks and was made to feel that he could do anything, that the world was his oyster.

Altman (1997) reports that supportive parents have a positive influence upon their children by preparing them to meet the developmental tasks of these years. Studies have also shown a strong relationship between parental support and academic achievement (Lee-Corbin & Evans, 1996; Miller, 1997; Pandey, 1984; Watson, Brown, & Swick, 1983; Windecker-Nelson, 1997), self-esteem (Coopersmith, 1967; Manscill, 1987), and occupational aspirations (Marjoribanks, 1989; Turner, Tippett, & Raphael, 1994). It is through interaction with family members that children develop the initial capacities for establishing relationships with others (Elkin & Handel, 1984).

During the later years of this stage, role identification becomes a particularly important aspect of development: like-sexed parents provide significant role-models (Super, 1963). Somewhat unusual, the women participants in this study strongly identified with their fathers, rather than their mothers. Perhaps, the cross-sex modelling of the women was an outcome of their relationship with their mothers. Researchers (Benson, Harris, & Rogers, 1992; Mellor, 1989) have found the quality of interpersonal relations to be a more relevant factor in the development of a woman’s identity than in the development of a man’s. Cecille and Sarah had mothers who were ill. Andrea’s relationship with her mother could be described as a bit stormy. On the other hand, Andrea’s relationship with her father, although distant, was much more amiable. In part, this was due to his active involvement in activities Andrea enjoyed and leaving the discipline issues to his wife to deal
with.

Almost all the CEOs referred to their father as being a strong role model and a person they admired for the values and attitudes he demonstrated. The most frequently mentioned was their dedication and commitment to their work, although this often resulted in a more distant relationship with their fathers than they would have liked.

The importance of the father to one's occupational choice cannot be underestimated. In a number of large studies, researchers (Nelson, 1939; Jensen & Kirschner, 1955; Mortimer, 1974; Werts, 1968) have found that the prospect of children pursuing the same occupation as their father is significantly greater than chance. Results indicated when sons didn't follow their fathers' occupations exactly, the occupations they did choose reflected similar value structures to those inherent in their fathers' occupations (Mortimer, 1974) or they progressed further up the occupational hierarchy (Jensen & Kirschner, 1955). However, in their study, Mortimer, Lorence, and Kumka (1986) found linkages to be moderated by the closeness of the relationship. Those with more distant relationships were not as likely to follow in their father's footsteps. If the relationship was close, but their fathers were dissatisfied with their jobs, sons usually made other occupational choices (Barling, 1991). It is believed that fathers do not overtly influence their son's choice of occupation, but do so indirectly by their behaviours and the occupational values they hold (Mortimer, 1974; Mortimer, 1976; Mortimer & Kumka, 1982; Mortimer et al., 1986).

Occupational linkages in this group of CEOs were found to be consistent with these studies. John, Paul, and Cecille's parents were entrepreneurs and owned their own businesses. These CEOs hold comparable positions as intrapreneurs. Similar to their fathers, Dan, Allan, and Andrea hold positions in management but all progressed higher in the corporate hierarchy than did their fathers. Following in her father's footsteps, Sarah
wanted to become a doctor but had to refocus her direction to psychology when she didn't have the marks to enter medical school. And, as the research would predict, Ron and Keith entered totally different environments than their fathers, although in his second career, Keith's father did become an executive in a corporate environment.

The CEOs spoke much less about their mothers as role-models. The most significant finding is a similarity between the occupational values held by John and Paul and those of their mother. John's mother took care of the sick and Paul's mother was an entrepreneurial type and ran her own retail store. Both Ron and Keith mentioned that their mother's characteristics tempered those of their father. Keith commented that his leadership style combines the discipline of his father's military style with the people centeredness of his mother.

Grandparents' values that were passed on to parents became an integral dimension of the self-concepts of John and Dan. Both sets of grandparents were influential in John's development by modelling the Christian values they espoused. He strongly identifies with his paternal grandmother whom he described as having a "real heart for people". Dan's approach to work is based upon the Protestant work ethic and moral standards he saw modelled by his grandparents.

From the age of about six, the school environment had a significant influence upon the development of these CEOs. In fact, Shaffer, (1989) states that no institution will have more of an influence on the development of an individual than the school. In this environment, a child will not only learn academic skills such as reading, writing, arithmetic, foreign languages, social studies, higher math, and science but he or she will be taught to obey rules, to cooperate with classmates, to respect authority, and to learn about societies' ways of life.

Academic excellence was expected by most of their parents. Generally this
expectation was met, with the exception of Paul, who did the minimum to get by. Cecille and Allan were high achievers and Ron and Andrea won scholarships to high school. It is interesting to note that because he did the minimum to get by, Paul would be in his early-twenties before he would realize the extent of his intellectual capabilities. He remarked, "Like a lot of things in my life, I discovered that once I was there, the issues around performance that looked pretty challenging from the outside weren't as formidable as they seemed. There was a steady advancement in my performance and confidence levels and I ended up doing quite well, particularly after the first year when I was perhaps over my jitters."

The school environment also provided a place to learn new skills that would be instrumental in their role as an executive. Sarah entered and won a public speaking contest with a speech she had written herself. John was class president, played lead roles in drama, and edited the school newspaper.

During this period, the activities in which many of the CEOs were engaged influenced the development of self-concepts. At eight years of age, Keith was already designing strategic processes and taking risks when playing competitive games with his friends. Six of the CEOs were involved in competitive sports that fostered the desire for success and the development of interpersonal skills. In addition, Cecille, John, and Sarah entered contests in which they excelled and fostered concepts of achievement, success, self-worth, and competence.

Research studies (Cauce, 1987; Coopersmith, 1967; Kokenes, 1974) suggest that though children evaluate their competencies in many areas, by the time they reach grade seven, self-worth is defined in terms of their cognitive and social competencies. Although one can not state unequivocally that as children these respondents would have had high self-esteem and self-confidence, their narratives suggest they likely did in most areas.
When responding in the interview to the question, what were some of your significant accomplishments by the age of fifteen, most referred to academic achievements, success in sports and contests, and the friendships they had established. Only Dan and Sarah openly acknowledged that they weren't overly self-confident as children, and Cecille remarked that she was unpopular with the other students when she was in grade five and did not particularly like herself. However, by skipping grade six, her popularity with them returned and she liked herself better too.

By the end of this stage, three of the CEOs had chosen occupations. Sarah and Andrea aspired to become doctors and Dan wanted to be the president of a railroad. In terms of Super's (1963) theory of vocational maturity, they were at a level comparable to older adolescents.

The Exploration Stage

The exploration stage encompasses the period when an individual attends high school and enters the world of work, training, or education. An individual assesses themselves, tries out roles, and engages in occupational exploration in school, leisure, and part-time work activities. By the end of this stage, usually an appropriate career has been identified and an individual has started to work in it (Super, 1957).

During this period, the academic achievement of the CEOs remained consistent with previous years with the exception of Andrea whose marks dropped significantly when she decided to have fun. Interests also remained consistent with those of the past. John, with the encouragement he was receiving from his parents, appears to have been the most adventurous in terms of trying new activities and dropping those in which he realized he didn't have the ability or the physical attributes to be very successful. Many of the activities in which he engaged developed leadership and communication skills that would prove useful in his career.
Moore (1969) has observed that individuals in successful careers are usually able to name several influential teachers ranging back to elementary school and most of the CEOs mentioned teachers and educators that were influential in their development. Educators played a role in the development of the self concepts of John and Allan, particularly the meta-dimension of self-confidence. Several teachers told Allan that he had the potential to go to university. In grade twelve, his math teacher suggested he write the provincial exams to obtain money to finance a university education. A guidance counsellor sent John to a state forum. This provided an environment in which John could compare his capabilities with high school students from all over the state. He learned that though there were brighter students than himself, he was in their league. It made him a bit more reflective about what he wanted to do, what gifts and skills he had.

At the time of graduation from high school, with the exception of John and Cecille, all of the CEOs had at least decided on an area of occupational interest. The careers of their choice were related to interests they had developed and/or school subjects in which they excelled. In terms of Super's (1963) theory, in which he set out specific developmental tasks, seven of the CEOs had reached a point at which they had not only crystallized a vocational preference by formulating ideas as to the field and level of work they wished to pursue but they also had specified a vocational preference, by making a commitment, at least in attitude, by embarking on specific educational training to enter it.

An interesting phenomenon in the data is the lack of parental involvement in career decisions at this juncture. Perhaps, this is an effect of their socio-economic status. The majority were raised in middle or upper-middle class homes. Elkin and Handel (1984) have found that parents in these socio-economic classes place a great emphasis upon children becoming self-directed and provide opportunities for them to belong to one or more organizations such as the Boy Scouts, the Girl Scouts, athletic teams, church and
synagogue groups and/or be involved in music, dancing, swimming, skiing, or tennis. These CEOs were no exception.

The phenomena may also be an affect of self-concepts being crystallized at an earlier age than is generally the average. Harren (1979), Holland (1985), and Super (1957) suggest that the degree to which individuals are able to establish coherent career plans seems to be linked to their progress in forming a crystallized self-concept or identity. Only Cecille and John appear not to have crystallized a vocational self-concept. John's comment that in his choice of a liberal college he was rebelling and fighting against the idea of going into religious work suggests that he had reached a stumbling block in the crystallizing of his self-concepts. Such individuals are continuing to explore their choices but have not committed themselves to some of the dimensions of their self-concept systems (Super, 1963).

The data also reveals a theme which Cox and Cooper (1988) commonly found in other research of successful elites—death and separation. Cecille, Sarah, and Paul experienced the death of a parent before the age of eighteen and Ron and Keith experienced a period of separation from a parent before the age of eight. One of the effects of such loss and separation is the early development of a sense of responsibility and a person's ability to take charge of one's own life. It is suggested that coping successfully with traumatic early life events sets a pattern for successful coping with future events (Cox & Cooper, 1988).

While at university, three of the CEOs adjusted their career expectations. Ron found out what scientists really do and felt it didn't fit with his personality. He graduated with a combined degree of science and business administration. Handling the maths and sciences became harder for Sarah and after summer employment as a probation officer, she shifted her focus to social work. Keith dropped out of university during his third year to take an
employment opportunity in aquatics, a field in which he had already gained a significant amount of experience as a volunteer and summer student.

University was also a time of engaging in new experiences that developed or shifted self-concepts. Andrea and John were involved in activities that developed organizational and leadership skills. Although John wasn't progressing through the developmental tasks as would be anticipated by Super's theory (1963), he was still the most adventuresome in trying new activities and in taking risks. It is possibly his choice of attending a liberal college and choosing philosophy as a major that delayed the crystallization of his self-concepts. Exposure to a college community where traditional views are likely to be challenged and new alternatives presented appears to extend the process of crystallizing self-concepts (Monro & Adams, 1977).

By the time of graduation from university, many of the CEOs had completed the next developmental task of implementing a vocational choice. This task is complete when a vocational preference has been acted upon by applying for admission to a specific program or taking a job at an entry level position (Super, 1963). Allan, John, and Sarah went directly into master programs and Dan enlisted in the navy before completing his MBA degree. Ron, Paul, and Keith decided to pursue work which was compatible with their abilities (Super, 1963). After graduating with two undergraduate degrees, a partial masters, and working for a short time, Cecille pursued an MBA degree. It was the first time she had entered a university program with an occupational objective in mind.

Again, educators were instrumental in some of the decision-making processes. One professor in particular encouraged Allan to pursue his masters rather than enter the workforce. In hindsight, Allan thinks this was a wise move because a recession was on at that time. He learned that the firm he subsequently joined didn't hire anybody that year. Andrea was so motivated by a number of her professors that she decided that she would
pursue a master's degree.

Educators at the graduate level served as strong role-models for John and Andrea. John received useful advice from the chancellor at the seminary, who had become a good friend. He suggested to John that he find an organization in which he could work and where he could make an impact, and leave something behind. One of Andrea's professors in her master's program was such a powerful role model that her influence is strikingly evident in Andrea's approach to her work and the passion she has to provide quality health care.

Six of the CEOs mentioned that pursuing a degree was valuable in developing the fundamental principles of management and communication. Five of them believed that pursuing undergraduate and graduate degrees helped them to develop disciplined and rational thought processes. Three of the CEOs mentioned that attending university makes you a more rounded individual. John also remarked that higher education had a positive influence on shaping his values and attitudes while giving him exposure to a completely different culture than the one in which he had been raised. All three of the female CEOs commented that they would not have become CEOs had they not had the degree. It not only helped in the development of thinking processes but in opening doors to employment opportunities. Bruce (1976) suggests that the longer a person stays in the educational system, the more adept one becomes at dealing with a wide variety of situations that are likely to arise throughout life. The person who does not go through the educational process has to learn from the experience of life.

There are two interesting phenomena in the data regarding education. Those who indicated that at some point they would return to university never did return. Keith lost his motivation to do so as he progressed through the corporate hierarchy. Although Sarah thought that she would pursue becoming a doctor as a mature student, an automobile accident left her somewhat disabled for life and she gave up the idea. Paul did apply to
enter a master's degree program but failure to obtain funding resulted in seeking employment opportunities. Due to his success, he never had the time to pursue it further.

The second phenomena and one that is very important to the development of self-confidence and self-esteem: Almost half of the CEOs experienced a time when they compared themselves to others and saw themselves as very capable individuals.

**Establishment Stage**

In the establishment stage, workers now try to find a permanent place for themselves in their chosen field. In the early years, there may be a certain amount of trial with some job or career shifts as efforts at stabilization prove unsatisfactory (Super, 1963).

All the CEOs obtained employment in their area of expertise. The data indicates that none of the CEOs stayed in positions for longer than five or six years and even these would be exceptions. Six of them changed positions or companies every two to three years but made no radical shifts in occupation or vocational field. Three of them made some initial adjustments early in their career. Ron made a major shift from engineering to logistics when he found things moved too slowly in the chemical industry. After a year in sales, Paul decided to change to investments when he moved back to Canada. Sarah made a number of major shifts, most of them were in her chosen field of social work. However, she also left the workforce to travel for three years. This latter action reflects a confidence in her own abilities and competencies to successfully re-enter the work force when she returned.

In this stage, relatives, friends, mentors, work colleagues, and professional contacts contributed to their development as successful leaders. Relatives and friends were helpful in providing information about employment opportunities and offering encouragement and support. Mentoring relationships were an important element in their development. However, quite frequently, it is only in hindsight that one realizes the contribution of a
mentor (Levinson et al., 1978). Sarah now recognizes that when her first two bosses, who knew each other very well, passed her from one to the other they were both grooming her for future success. Paul had two mentors as he progressed up the corporate ladder. One, an Executive Vice-President, convinced him to make the shift out of investments into the insurance side of the business. The other, an executive who preceded him as president, was influential in bringing Paul into the corporate offices as a vice-president.

Both Ron and Andrea acknowledged that a good mentor is someone who is an effective teacher and who assists in a person's development. Andrea had a front-line manager who encouraged the development of her management capabilities. This initiated another redirection of her occupational choice to that of a manager. Ron mentioned that he had managers that "pushed and nudged" him along. He acknowledged that he had been fortunate in having people whom he could respect and learn from.

Cecille and Ron spoke in terms of "institutionalized mentoring." Both worked for consultants who encouraged their leadership skills by affording opportunities to conceptualize problems and articulate solutions in a demanding environment. In both instances, they felt their managers committed them to deliver things that were beyond their capabilities. But with their bosses' support, they rose to the challenge.

Although Allan and Dan acknowledged that people for whom you work do have an influence upon you, neither could name a particular individual who fostered their development over a significant period. In fact, Allan was quite adamant that he does not ascribe to the popular belief that a person will do better if they have a great mentor. He feels that it is up to the individual to gather "an assortment of knowledge" by seeking exposure to a wide variety of situations. Most of the CEOs remarked that they had had the opportunity to work with or be associated with some really great leaders and had learned things from all of them. In the not-for-profit sector, both Sarah and Keith acknowledged the
contribution that professionals, acting in the capacity of a volunteer, had made to their development as managers and leaders.

When mentors were unavailable in senior positions, Sarah sought out women in similar positions and shared work experiences at dinner meetings. In a recent article in a periodical devoted to leadership, Cheryl Dahle (1998) suggested that women have changed the rules and invented formal practices for mentoring where none existed before. She remarked that women have made mentoring more organized and focussed by having regular meetings. She feels that women's mentoring is "more about commitment than about chemistry, more about personal growth and development than promotions and plums" (p. 186).

The people who influenced CEOs were not always those whom they had personally met. John's values and beliefs about social action were influenced by a number of individuals whom he had only read about. Similarly, Andrea has been impressed and inspired by the values and leadership skills of people such as Charlotte Beers and other CEOs who are finding innovate ways to manage.

During this stage, the CEOs refined existing skills and developed new ones. Most importantly, it was a time when they were building a reputation by taking on immense challenges and achieving significant results. They not only came to see themselves as extremely talented and competent people but others such as recruiters and senior executives shared that view. Once established in a field, none of the CEOs made any radical career shifts during the early or middle portion of this stage. This is probably due to the importance they all place on having expertise in the field as a basis for making intelligent decisions.

In contrast to entrepreneurs who create their positions as CEO, these people had to be appointed to the position. All but Sarah, John, and Allan became CEOs of major
corporations during this period. Although Allan was appointed as the CEO of a subsidiary company, it would be another six years before he would be appointed to the top position in the Canadian organization.

One of the most significant findings of the study is the importance of self-concepts to success, particularly the meta-dimension of self-confidence. It was only when Sarah reached the second highest position in an organization that she decided that she wanted the top job instead of making someone else look good. It was the first time she was conscious of wanting to do something more senior. Dan remarked that as he moved upward through the corporate hierarchy, his self-confidence grew. Allan, Paul, and Andrea specifically mentioned comparing themselves with senior executives and perceiving themselves to be just as talented and capable, if not more so. However, when Andrea was unexpectedly appointed to the position, she took a major risk and her self-confidence appears to have dropped somewhat. It is worth noting that both Andrea and Ron, the only CEOs appointed while in their thirties, took a major gamble in accepting the position: their past experience was limited to a particular area of management. Both these CEOs expressed feeling scared at the time of their appointments, an experience not reported by any of the others. Interestingly, both also faced huge crises within days of being appointed, crises which they successfully handled. During their tenure, both made significant contributions to their organizations within a short period.

The data suggest that the CEOs moved smoothly through the developmental stages without any significant difficulties. With supportive parents and teachers offering encouragement, they were involved in activities which fostered the development of vocational concepts that were congruent with their interests and abilities. Cecille got off to a slow start in finding a vocational focus. There seemed to have been no pressing need to do so. John experienced the most difficulty in crystallizing his self-concept. Placing himself in
situations where his basic beliefs and values were challenged extended the process but
broadened him as an individual.

**Personality**

For purposes of this study, personality is being denoted as the more stable,
unchanging traits of a person that generally account for consistent patterns of behaviour
(Pervin, 1989). These include intelligence and aptitudes, motivational needs, values, and
interests. A central construct of trait theory is the recognition that every person is unique
and no two people are quite alike, therefore, individual differences exist (Carver & Scheier,
1992). Since the participants of this study are a very homogeneous group, it would be
expected that some of the attributes of their personalities would be common to all. It would
also be anticipated that some individuals will have personal characteristics that are less
globally represented within the group, and some that would be unique to one individual.

**Intelligence and Aptitudes**

As managers and executives, many of the CEOs were involved in tasks that involved
solving problems. To do so required them to think creatively, plan strategically, and be able
to conceptualize, articulate, and implement their ideas.

Most of the CEOs spoke about some unique feature of their ability to think and their
comments are strikingly similar to the definitions for the three types of intelligence (creative,
practical, and analytical) that Sternberg (1997) believes essential for success in senior
executive positions. Cecille commented on her gift of seeing what everyone else sees but
thinking something different. Keith spoke of being ambidextrous and drew a parallel to his
ability to think about people and situations from both an emotional and an analytical
perspective. Allan pointed out that you don't get to these positions without the ability to look
at the world from many perspectives and then to be able to zero right in on what it is you
want.
Examples of emotional intelligence as defined by Goleman (1995) can also be found in the narratives. John remarked about his ability to use "lateral perception", a term he used to describe his sensitivity to how he is being perceived by others, his awareness of how he is experiencing others, and what is going on around him. Being self-aware of her weaknesses, Andrea enrolled in courses to upgrade her skills and to be prepared for opportunities when they arose. When in situations where she was unsure of what she should do, she was not afraid to ask others for advice or suggestions, rather than try to bluff her way through them. Several of the CEOs, sensitive to the constraints that hierarchical models impose upon staff, changed the organizational structures when they had the autonomy to do so.

**Motivational Needs and Personality**

Every individual has psychological needs which Murray (1938) defined as the internal directional forces that determine how people seek out or otherwise respond to objects or situations in the environment. Although it is not possible to measure the press or the strength of these needs from narratives, an examination of them did reveal characteristics of the participants that are congruent with those qualities that corporations look for when selecting individuals for senior executive positions.

Not surprisingly, references to achievement which subsumes the personality traits of ambition and competition were the most frequent. Those with achievement needs aspire to accomplish difficult tasks and are willing to put forth the effort to attain excellence (Murray, 1938). The press of this need results in the reputation for results that is the top ranked determinant in the final selection of a candidate to fill senior executive positions (Rau, 1997). As Rau points out, "At this level and at this stage of the process, no one is going to take a chance on somebody who hasn't proved his or her capabilities in a comparable situation" (p. 50).
The next most common motivational need was *Affiliation*. Individuals with needs for affiliation enjoy being with friends and people in general and they make efforts to resolve differences, cooperate, and maintain harmony (Murray, 1938). These qualities encompass the important interpersonal skills that are key to the success of a leader. In fact, interpersonal skills was ranked the second highest factor that corporations look for when hiring senior executives (Rau, 1997).

As expected, references were found to *Endurance*, the desire to work to produce results over an extended period, *Autonomy*, the desire to be self-reliant, and *Dominance* which includes the constructs of assertiveness and self-confidence. Without the presence of these motivational needs, it is highly unlikely that they would have gained positions of such eminence. There were also numerous examples of *Understanding*. These included being curious about things, the need to be logical and coherent, and to be accurate in the way they express their thoughts in concepts and words. Two of the CEOs expect to eventually publish their ideas.

Another motivational need that was frequently mentioned is that of *Change*. This need is reflected in the enjoyment of travel, pursuit of novelty, adventure, and a desire for new sights, books, and ideas. Most of the CEOs also made references to *Social Recognition*—the desire to be held in high esteem and recognized by others for the work they do.

In all but Allan's profile, references to *Deference* were found. The presence of this trait can be viewed as being either a positive or negative factor depending upon the context in which it occurs. For example, if *Deference* is found in combination with *Recognition*, the individual will likely obey orders in any circumstance so he or she can be promoted. A person who has a mixture of *Deference* and *Blameavoidance* would likely flatter someone in order to avoid opposition and censure. If *Deference* is allied with
In Dominance, the individual would flatter a superior or some other influential person in order to be chosen leader. However, in these narratives, all instances of Deference related to their high regard for a person's ideas or their admiration of the qualities they possessed. On the other hand, references to Rejection were also noted in a few of the narratives. In all instances, they were related to comments made by the CEOs that were critical of ineffective teachers, poor managers, or parental leadership styles.

About a half dozen references were found that related to Succorance. Three CEOs remarked on turning to friends, partners, or associates for support or guidance when faced with hard decisions, failure, or disappointment. Two mentioned finding support in their religious faith during these times.

The primary constructs of Abasement are the need to be passive, timid, and weak, and to accept blame and criticism even when it's not deserved. Not surprisingly, references involving this need were not found. Nor were references to Harmavoidance, which from an ideological perspective is the avoidance of expressing one's beliefs because of the fear of rejection and censure.

There were instances of Infavoidance relating primarily to CEOs who gave up sporting activities to which they were not particularly suited and employment opportunities that did not appear promising. An example of this need would be Ron's decision to walk away from a business venture in which he had invested a sizeable amount of money but appeared to be headed in the wrong direction. The presence of Infavoidance in these types of circumstances suggests that these individuals are not wittingly going to set themselves up for failure.

While it was not the purpose of this study to psychometrically measure attributes of their personality, some of these motivational needs would be stronger than others and did play a more substantial role in their career development. This will be discussed at a later
Values

There is also a high degree of consistency in the personal and social values that these CEOs hold. Respect for people is one of them. Several of the CEOs remarked that having respect for people is a basic and fundamental principle that they uphold and one vitally important to success. To have people buy into their vision, they must be seen as genuine and trustworthy, interested in ideas and opinions of other staff, and not willing to bend corners to suit their purposes.

High ethical standards and integrity were also values that were commonly professed. In this regard, Dan was the most vocal. He views himself as inflexible in matters of ethics and will resign from positions rather than compromise his standards. On one occasion, he resigned because he was uncomfortable with the ethics of the chairman; that chairman ultimately went to jail. Ron was fired because he wouldn't compromise his integrity in a financial matter.

Other values were singled out as critical to managerial and executive positions. Personal responsibility and accountability were frequently mentioned. Allan feels strongly that we live in a society where people love to "syndicate the risk and decision making." He believes successful managers and executives are those who take charge and are accountable for their actions and the results of them.

Personal excellence is also highly valued as is striving to do your best. Consequentially, over half of the CEOs see their jobs as time limited. Andrea expressed it well when she remarked, "When you've been a leader in an organization for eight or nine years, at some point you have to recognize when your impact wears a little thin. It's not good for them, it's not good for you, and it's not good for the hospital [organization]."

Surprisingly, money and power do not appear to be major underlying values that
motivate these people. Rather, many of them mentioned that they enjoy their work because of the opportunities it affords them to achieve something worthwhile, help others be successful, and/or make a difference in people's lives. Especially notable are comments made by Sarah and John, who work in the voluntary sector. They give the impression that they feel a bit guilty about not doing enough in their community, although both recognize that the work they do as executives helps people. Both would like to be actively engaged in helping someone on a one-to-one basis in the community.

John was the only CEO who spoke of his work in terms of "a calling". It is important for him to be doing what he believes God is calling him to do, not what others want him to do, or what he thinks he should be doing.

Some CEOs mentioned times when their commitment to their work intruded upon their personal life. When this type of conflict arose, commitment to their work superseded that of their spouse or family. Most acknowledged that these times were of a limited duration but, if one wished to, one could easily become a workaholic in senior executive positions.

Friendships are also highly valued. Several of the CEOs have friendships that began in childhood and several more have maintained friendships with business associates over long periods.

Having a positive attitude was mentioned by about half of the CEOs as a requisite for success. Both Andrea and Cecille believe that losing a particular opportunity and the ensuing upheaval can be positive. Such an event can lead to new opportunities that can change one's life for the better. Both of these women spoke from personally experiencing such a disappointment.

Interests and Hobbies

As noted previously, many of the CEOs were interested in competitive sports that
developed certain attributes characteristic of a leader. However, their engagement in competitive games such as chess, checkers, crokinole, and board games also developed skills that play a substantial role in a leader's success. Gene Cohen, a noted geriatric psychiatrist and former director of the United States National Institute of Mental Health's Centre on Aging suggests that playing these types of games fosters decisiveness and an ability to see patterns. These activities also promote the ability to improvise in the light of incomplete information and to change strategies in midstream (Franklin, 1997). Christopher Osborne, a San Francisco attorney, believes that the hundreds of little decisions that games require helps him stay intellectually flexible. He remarked, "Game playing reinforces the fact that it's possible to lose ground and still win" (Franklin, 1997, p. 80).

Reading was another interest that is common to a majority of the participants. As children and young adults, the most frequently read materials were mystery novels, biographies, and autobiographies. The first category can involve the reader in problem solving, while the two latter categories can inform the reader about alternative ways of handling life situations. Cecille, Allan, and Ron described themselves as voracious readers. As children, they read just about anything they could get their hands on.

Chains of Choice and Chance

Career development is not a simple, linear process which arises in response to a single decision. Rather it occurs in a context of multiple decisions that are interrelated. A current decision can affect a past decision that is now playing out or has yet to be played out, and/or it can affect subsequent choices (Tiedeman & O'Hara, 1963). Thus, the metaphor of one's career development as a chain of interlinking choices is an apt one. Although a person would like to be in control of what those choices are and when they occur, this is not the case. Some choices are driven by forces or structures outside the individual. These include the staging of education, life circumstances, economic conditions,
the timing of job vacancies or promotional opportunities, and fortuitous events. As
decisions related to career development are made over a span of time, Super's vocational
stages will be again used as a framework for the analysis. A matrix of the CEO's choices
related to career development are included as Appendix H.

**Growth Stage**

During this stage, the participants were involved in a number of activities in a
multiplicity of environments which provided an opportunity for them to assess what they
enjoyed and did well. By the time they reached grade eight, Sarah, Andrea, and Dan had
decided on specific careers. Although their choices appear to indicate a desire for
prestigious positions, the reasons for their choice are related either to their interest in
working in a particular environment and/or the values they share with those working in that
environment.

**Exploration Stage**

Most choices in this period were prompted by external forces. In their final year of
high school, the CEOs were confronted with the decision of entering the workforce or
pursuing an undergraduate degree. This decision can have significant ramifications on
future choices. Although all the participants decided to pursue an undergraduate degree,
even these choices were affected by a number of external forces: academic achievements,
financial resources, availability of scholarships, and family expectations. Cecille and Andrea
really didn't have a choice; it was just expected that they would be going to university.
However, Andrea's decision to have fun in grade eleven resulted in her grades slipping
dramatically. Acceptance into a degree programme in medicine was no longer an option.
Among the many alternatives available, she chose nursing. Although a less prestigious
position, it was one that was still consistent with her values and allowed her to work in a
hospital environment.
Allan's family did not have the resources to fund a university education. Deciding to follow the suggestion of his math teacher, he wrote the provincial exams and won a scholarship. The death of Paul's father precipitated his premature entry into the workforce to earn the funding for his university education. And, to earn funds for his university degree, Keith applied for a position as a camp counsellor. This decision was the first link in a chain of choices that would lead to his attainment of a position as a CEO.

Upon graduation from high school, Ron and Keith had decided to pursue careers in science, a field which was congruent with aspects of their personality and interests (a need for understanding, interest in the outdoors). Although Allan had many alternatives, he chose to pursue a career in chemical engineering based on his interest in science and mathematics.

The staging of a university degree program usually necessitates the choice of a major. This proved to be a particularly difficult decision for John because he hadn't yet decided on a career. Pressed to make a decision, he chose philosophy. Although his experiences in elementary and high school would suggest that communications would have been a better choice, his narratives indicate that he was struggling with a number of existential issues and this choice was not as radical as it might at first appear. However, with the anti-religious sentiment in the United States at its height, this decision resulted in a turbulent period in his life. Although those years were stressful, John feels the experience was extremely beneficial in broadening his outlook and providing skills in developing rational thought processes and the ability to clearly articulate his ideas.

Earning financial resources to continue their education during this period played a role in the career development of Allan, John, and Sarah. Allan and John's decision to apply for summer jobs with major corporations was the first link in a chain of choices that resulted in these men becoming CEOs of those organizations. Sarah's summer
employment as a probation officer prompted her to change majors and pursue a career as a social worker. This decision solved the academic problems she was experiencing in maths and sciences.

**Establishment Stage**

Despite overtures from other employers, Paul, Allan, and John have remained with the organizations they joined early in their career. With the exception of John, career decisions involving promotional opportunities were initiated by the company. Allan remarked that he never had any hesitation in accepting any of the promotional opportunities offered to him, despite having to move over fifteen times including several times between Canada and the United States. Paul acknowledged that he had turned down promotional opportunities because he did not want to be separated from his family for extended periods.

Not all decisions were easy to make. Janis and Mann (1977) have suggested that the level of stress of a decisional conflict is related to the goals of the individual, the needs associated with those goals, and the expectation that certain needs will be unmet as a result of the decision. Not only was Paul uncertain of the outcome of changing his career direction when a senior executive suggested he transfer to another division, he wasn't particularly interested in the job they were offering him. Nor was John very interested in setting up communications links in twenty offices around the world. However, his decision was made easier when someone convinced him, that while in this position he would still be involved in helping others "by being a voice for those with no voice." It is interesting that both of these individuals made some type of agreement that somewhat limited their risk of accepting the position should things not work out.

Some decisions in this period were outside of the control of the CEO but were precipitated by previous decisions they had made. Early in her career, Cecille didn't understand the importance of the chain of command in organizations and she accepted an
opportunity that her boss's superior offered her. This so angered her boss that she was passed over for a promotion. Although a few years later, her supervisor admitted to treating her unfairly, his decision prompted her to look for other employment opportunities that resulted in securing an employment opportunity which surpassed that which she had had. Both Dan and Ron chose to take a stand on management or ethical issues and were fired as a result.

Generally, making decisions that affected their career was not fraught with anxiety. Only when there were conflicts between work and personal values did the experience become stressful for some of them. When things were not going well and there was little chance of a turnaround in events, they initiated changes, whether that was changing a college major or seeking better employment opportunities.

Those that remained with one organization readily accepted promotions, although for two of the participants this meant moving many times during their career. The six participants who moved between organizations actively sought out employment opportunities for advancement. However, it is important to point out that opportunities for advancement, whether these were internal promotions or external offers of employment, were only available to them because of their past achievements and choices. For example, the chain of events that led to Keith's attainment of a position as CEO began when he successfully competed against other swimmers to become a waterfront supervisor. He was successful because he had developed the skills to be a strong swimmer and out perform other competitors. Likewise, subsequent choices during his career were an outcome of previous decisions to develop skills that led to achievements that set him apart from others. Thus, the chain of choices that make up one's career development are always an outcome in some way of previous decisions and achievements.
The Role of Happenstance and Luck

Another external factor that can become a link in the chain of decisions or events affecting one's career development is that of luck or chance. Wallach (1994) defines luck as serendipity, synchronicity, grace, coincidence, or timing. Its defining characteristic is that it cannot be controlled. Wallach suggests there are four types of luck: luck by accident, luck in retrospect, luck by opportunity, and luck by design. In some cases, a fortuitous event is a combination of different types of luck.

Luck by accident occurs when one has absolutely no control. Examples are the country in which one is born, one's socio-economic status, and who your parents are. The demographics of the participants reveal that all of them were born within a fifteen year period beginning in the midst of the depression. While the possession of an undergraduate degree would have distinguished them, holding a graduate degree at that time would have definitely set them apart from other applicants. Although some of the CEOs began their careers during a recessionary or post-recessionary period, none reported having any difficulty in initially securing a position in the field of their choice.

Several CEOs mentioned that they believed they had inherited personality traits that made them effective leaders. Researchers (Plomin, DeFries, & McClearn, 1990; Bouchard, 1994; Loehin, 1992; Rowe, 1998) now suggest that genetics account for between .40 to .49 of one's personality traits. It is believed that nearly all psychological traits contain some genetic variance and these extend to religiosity, vocational interests, and social attitudes (Rowe, 1994, 1998).

When examining the narratives for events that precipitated a decision that subsequently affected their success, there is only one: the freak train accident which resulted in Dan's recruitment to manage the division. His success in this role led to subsequent appointments to senior executive positions including that of CEO.
There were several instances of narratives that exemplify luck in retrospect. These are instances where a chance event is only viewed as luck when looking back on a situation. For example, Paul heard about a job opening with the firm he now heads because his brother-in-law happened to have worked for that organization during the summer and knew they were going to be hiring. Another example is Keith's decision to move west with his girlfriend. This decision led to his application for a position he saw advertised by a recruiter. Although he didn't get that job, Keith's name was on the recruiter's file when a vacancy for a position as a CEO needed to be filled. Keith was contacted to compete for the position and won.

Cecille, Ron, and Keith spoke about having had the luck to have worked for people who helped develop their leadership skills so that they could take advantage of future employment opportunities. Keith relates his success back to the early exposure he had to leadership training, when at the age of eighteen, he had a "very brilliant man" as a mentor who ensured that he had the opportunities to develop his leadership skills. During the interview, Keith pondered whether he would have become a CEO if he had not met this individual.

Luck by opportunity was also evident in the narratives. This type of luck is characterized by being constantly on the lookout for opportunities, recognizing them as such, and taking advantage of them. An example of it is John's seemingly off-handed question during lunch with an executive who was being transferred to another country. His query as to the possibility that he could fill this position resulted in a chain of events and choices that subsequently led to John's appointment as CEO of the Canadian organization.

Ron attributes his first appointment as CEO to a combination of being in the right place at the right time with the right goods. Bandura (1982), Krumboltz (1998), and Wallach (1994) suggest that such individuals weren't just lucky. They made previous decisions
regarding education, training, and job choices which put them in a situation in which they could take advantage of these kinds of fortuitous events.

The fourth perspective, luck by design, is more deliberate: individuals anticipate situations and then take steps to increase the likelihood of a positive outcome to an unforeseen situation. Two decisions that Cecille made fall into this category. When she chose to complete part of her MBA in French, she knew that having this degree and being bilingual would be a good combination because the Prime Minister of Canada was pushing bilingualism. When she graduated, the government was looking for MBAs who could speak French. Cecille also believed that by taking a position as a senior vice-president with a particular firm, she had a one in three chance of becoming the CEO of that organization. She became CEO.

There are also combinations of luck. John joined the organization he now heads because of a number of chance factors. (1) The professor John had worked with during previous summers was on a sabbatical (luck in retrospect). (2) The organization needed a media relations person to do some work during that summer and he had skills they were looking for (luck by opportunity). (3) At the time of his graduation, still unsure of what he wanted to do, the organization had a vacancy in their media department and John was hired for the position (luck by accident).

All four kinds of luck played a role in Andrea's appointment as CEO. Spotting a very small article in a newspaper for a hospital that was opening (luck by accident), she set her sites on being hired in that position and secured it (luck by opportunity). Believing that she would have little impact at board meetings, the CEO allowed her to attend them (luck in retrospect). She took the opportunity to make presentations to the board so that they would know what she could do, what she was all about, and "that they had somebody unique", should the CEO decide to leave (luck by design). When the CEO resigned suddenly at a
very critical time (luck by accident), it left the board very nervous. Rather than appoint a stranger, they chose Andrea (luck by opportunity).

Though most of the CEOs commented on luck as a contributing factor to their vocational success, inevitably, the consequences of an unplanned event could not have happened without some action on their part. They made particular prior choices that placed themselves in the right place at the right time to take advantage of these fortuitous events. Though events of luck and happenstance became links in the chain of choices that comprised the career development of these CEOs, they were invariably interlinked to previous choices that had been made and to future choices that would be made. As such, they are an integral determinant in the attainment of a position as CEO.

**Gender**

There have been hundreds upon hundreds of articles and discussions in the mass media and professional journals on the difficulty of women reaching the top positions in corporations. Most attribute the problem to a metaphorical phenomenon known as "the glass ceiling." "What glass ceiling?" would be the response of Cecille and Andrea. And, although Sarah acknowledged there was a glass ceiling in the voluntary sector, ("It was alright to be a secretary but not a senior executive"), she never felt that it had been a "terrible hardship" to get to be a CEO, that she had to fight and scratch her way to the top, or that it was only because she really stood up for herself that she got anywhere.

When you examine the narratives of these women, and these women were some of the first wave of women to become CEOs, three themes emerge. (1) They believed in being the very best. (2) They felt themselves the equal of men but didn't approach their jobs exhibiting a traditional male approach. (3) They attributed their success to hard work and a reputation for producing outstanding results. Whether it is Cecille's theory on the presumption of equality, Andrea's mantra of being the best, or Sarah's theory of
responsibility, responsiveness, and reliability, the message is basically the same. They were not caught up in thinking that they had to work harder because they were women.

The factors that these women regard as key determinants to their attainment of a position as a CEO are frequently being cited by other women as keys to their success. Northcutt (1991) surveyed 249 successful female executives who were nominated or selected for her study by their peers, professional organizations, civic groups, women's recognition events, or their employers. On a questionnaire that contained a Likert-type scale, the most frequent words they chose to describe themselves were responsible (M = 4.63, SD = .54), competent (M = 4.41, SD = .59), hard-working (M = 4.41, SD = .66), committed (M = 4.40, SD = .62), and sincere (M = 4.38, SD = .66). When measuring self-esteem, the most strongly agreed-with statements were: having a number of good qualities (M = 3.79, SD = .41); feeling like a person of worth, at least equal to others (M = 3.74, SD = .45); and being able to do things as well as most others (M = 3.55, SD = .59).

Mainiero (1994) also conducted interviews with 55 women executives who had at least reached the level of vice-president of a Fortune 500 corporation or its equivalent. These women were well known for their accomplishments in their firms or industries and were regarded by others as women who were credible and talented managers. Mainiero found that most of these women attributed their success to hard work, dedication, intelligence, luck, career opportunities, and later in their career, a proven track record of performance. Other traits that were mentioned included earning the respect of others by building credibility in the company, putting into practice a unique management style, learning how to influence others, and having the ability to make tough decisions. They also attributed their success to political skills, having more to do with speaking the truth about business at hand rather than conforming to the norms of how others expected business to be done. Mainiero suggested that through a combination of astute observation, a
willingness to take risks, and sheer naivete in the initial stages of their career, women become seasoned into mature and credible senior managers.

Interestingly, the narratives of Sarah, Cecille, and Andrea indicate that they also exhibit the prime characteristics that Goleman (1995) ascribes to emotionally intelligent women. They tend to be assertive and express their feelings directly. They feel positive about themselves. Life holds meaning for them. They are outgoing and gregarious. They adapt well to stress, are comfortable enough with themselves to be spontaneous, playful, and open. They rarely feel anxious or sink into rumination.

Although the glass ceiling was not an issue for Andrea, she has experienced sexual stereotyping throughout her career, both as a nurse and a manager. She related a number of incidents where sexual bias was blatantly obvious. Although she finds them annoying, they do not divert her attention from what she wishes to accomplish.

One gender issue, that is frequently cited by women who aspire to senior positions, is maintaining the balance between work and family life. It appears to be most problematic when children are involved. Andrea spoke about how tough it was when she had to work extremely long days for a period of 18 months and her daughter regularly conveyed to her that she was feeling neglected. However, all three women acknowledged that one isn't engaged in these kinds of activities forever and it is a case of setting priorities and managing your workload. It is interesting that several of the male CEOs also spoke about having to negotiate career commitments with their wives, especially when travel played a significant role in their work. Various strategies to deal with trying to balance professional and domestic roles were frequently mentioned and these are included in the profiles.

Life Themes

To this point, some key determinants in attaining the position of a CEO have been identified: the formation of a self-concept that includes a picture of one's self successfully
performing in the role; personality attributes including motivational needs, values, and interests that were found to be common amongst the participants; the role of parents, educators, mentors, and friends; and the role of choice and happenstance. However, an unexpected but fascinating anomaly in the data remains unexplained. Only one of the nine participants aspired to become a CEO! To answer this question, it requires a shift from traditional career development theories to that of career counselling, and specifically, to career counselling as practiced from the postmodernist framework.

Csikszentmihalyi and Beattie (1979) have suggested that the work chosen by professionals is an integral part of a life theme which is being played out, that it is an important aspect of the adaptive strategies that are developed as an attempt to cope with the experience of stress during childhood (Emery and Csikszentmihalyi, 1982). Although clients' earliest recollections clearly reveal the central existential problem or life theme, if one truly believes the whole is in every piece, then any story that a client chooses to tell will suffice (Savickas, 1997). Therefore, the narratives from the interviews provide a rich source to determine how the life themes of these CEOs contributed to their attainment of a position as CEO.

Appendix I is a summary of each of the CEOs life themes, motivational needs, values, and occupational interests. Included are "snippets" from their narratives to provide support for what I hypothesize. It is important that the reader be aware that the reconstructions that follow are the writer's interpretive analysis as to how life themes and role models contributed to the attainment of a position as CEO. Since Andrea and John's profiles include both elements that counsellors practicing within this framework use to make meaning of their clients' lives, their data is the richest of the participants.

In most of the profiles, there is adequate information to determine life themes and motivational needs. However, there are a few profiles where it is difficult to determine their
life goal without knowing who their role models were and/or the meaning they ascribed to them. Rather than speculate on missing data, I have not analyzed these. Interestingly, the one profile from which a life theme could not be determined was that of Dan, and he was the only participant who aspired to be a CEO from the time he was a child. This may be an anomaly of the data or be a rather significant finding. But, there is no way to untangle the two.

The life theme that emerged from Andrea’s profile is breaking free of constraints, her motivational need is for social recognition, and the goal for her life is to help others.

From Andrea’s description of her home environment, it was a place where her opinion was not very important and where there were many restrictions put upon her, especially by her mother. When she attended school, she found those same attitudes prevailed. In other words, Andrea found her environments constrictive and unresponsive. Her solution to the problem was to break the rules and by doing so, she became noticed, albeit, in a negative way. When describing herself in both home and school environments, she uses a good/bad dichotomy to describe herself in relation to others.

From her profile, it also becomes apparent that her vocational self-concepts developed and shifted as she encountered two role models with whom she strongly identified. The first, Dr. Kildare, was the protagonist of a popular television series that aired when Andrea was about twelve years old. The character, a young doctor, was recognized as an outstanding practitioner, but one who was often in a conflictual situation with the chief of staff over issues of patient care. By strongly identifying with this character, it appears that Andrea found a solution to the over-arching tension in her life and a life goal she felt worth pursuing: "Whatever it is I was going to do, it would be in a hospital where all that drama was going on. I was so in awe of people who looked after sick people and I wanted to be one of them."
Her second role-model, a professor whom she encountered while pursuing her master's degree, shared a number of similarities with Dr. Kildare: "She had an ability to be with people. She challenged you to be better than you would otherwise ever be. She was just this amazing, awesome person that I wanted to be like. Outspoken, intellectually challenging, and in the end, took a real stand for nursing and patient care." After coming to know this individual, Andrea shifted her occupational goal to that of a teacher.

However, Andrea decided she needed practical experience and began working as a nurse. While she was a head nurse, she began to be supervised by an individual who encouraged her to develop her management skills. At this point, Andrea decided she wanted "management" and she figured that sometime later in her career she would teach. It is not surprising that Andrea should change her vocational aspiration again when she began to experience some autonomy in her work. Besides, a classroom is not an environment in which much drama is going on and teaching is a number of steps removed from actually helping the sick.

As a manager, her work provided some resolution to the over-arching tension in her life and it provided a limited means for meeting her motivational need for social recognition. However, as she progressed to more senior positions, she had greater freedom to do things she wished and to get the recognition for her accomplishments. When she became the vice-president of nursing care, she had the opportunity to: "create a culture, to have an influence on the final details of the construction of the place, to be involved in hiring the kind of people I wanted and to provide the kind of care I wanted to provide." In this position, she had the freedom to demonstrate that she was a unique person.

Once she made the decision that she wanted management, becoming a CEO was a natural progression for her career path: it provided a means to resolve the overarching tension of her life while meeting her life goal of making a difference in people's lives. The
higher the position in the hierarchy, the greater the autonomy and opportunity she had to show her uniqueness and be recognized for it. As a CEO, what others once viewed as a detriment is now seen as a positive quality of her leadership style. A statement Andrea made sums it up well: "I do what I do because it makes a difference for sick people. That's why I love this job, not because of the title. I am not this job! It's what it allows me to do that I love. Because I can make more of a difference out of this office for patients than I even could at the bedside."

John's life theme is an existential problem: finding God's will for his life's work. His motivational needs are achievement and understanding. His life goal is to help others through social action. As a child, John's role models were his father and his father's mother who demonstrated a passion for helping others.

It is a theological construct of John's evangelical Christian background that creates the over-arching tension in his life: "You have to do what you believe God is calling you to do, not what others want you to do or think you should do." Although John was not feeling pressured by his parents to enter the ministry, it was definitely an issue that was creating stress for him: "... I probably was slated for a career in religious work a long time ago but I think I rebelled and fought against it to a certain extent."

By the time John graduated from high school, he had already held positions of leadership. Though others recognized his potential, he didn't "picture" himself in the role. He saw a position of leadership as something boring and a role that would not allow for the expression of his creativity.

His choice of a liberal college and the choice of philosophy as a major are the first substantive steps that John took to resolve his existential problem. Though these years were difficult, his beliefs were challenged and he broadened his experience. By the time he graduated from university, he has become politically active: he had participated on debating
teams that discussed social issues and marched in anti-Vietnam demonstrations.

After graduation, on the suggestion of an area manager of a parachurch organization, John left home to attend seminary. While there, he read the biographies of several politically active Christians. These men provided the template upon which John could model his life and their lives pointed to a worthy life goal. John remarked that their stories confirmed his belief that faith is important and it is worth risking your life to communicate that. While at seminary, he also met some leaders whom he really admired but whom evangelical Christians would term "liberal". His association with these people changed his concept of what it meant to be a "Christian" and he began to think in terms of becoming a leader. However, at the time of graduation, he was still unsure of his "calling."

Fortunately, the organization for which he had worked the previous summer offered him employment as a media programmer. Working for this organization provided an opportunity to put his Christian values into action. As he was promoted to more senior positions, his self-concept as a leader crystallized. His work roles provided him an outlet for his motivational needs for achievement and understanding. As he progressed to more senior positions, he continued to find the challenging work he desired and has seemingly resolved the overarching stressor in his life of finding God's will for his life.

Both John and Andrea's stories illustrate how one can find adaptive ways to resolve a life theme through one's occupational interests and how role models can provide a template for living one's life. The narratives of the other CEOs also suggest that once settled in a career that is congruent with working out the over-arching tension created by a stressor in one's childhood, the more senior the position, the greater the opportunity to find a means to resolve one's life theme. As Savickas (1995) states, "People organize their lives around a problem that preoccupies them and a solution that occupies them" (p. 195). Although the information in the other profiles is not as detailed, one can ascertain how their
occupational roles provided a means of resolving a life theme.

Ron's narratives suggest that his life theme centers on not measuring up. His motivational need is social recognition and his value or goal appears to be personal achievement, although it is difficult to state unequivocally what meaning he ascribes to his role models. However, there is enough information to substantiate that Ron's occupational choices after he had decided that becoming a scientist didn't fit with who he was, moved him in the direction of resolving the over-arching stressor from his childhood of not measuring up. As a consultant, then increasingly so as a manager and leader, his efforts produced results that were noticed by others and he was recognized for his achievements both socially and financially. Like Andrea, his occupational roles were a means to turn the over-arching tension from childhood into a positive element of his management style. Measurement is the means by which he has improved the profitability and efficiency of the organizations he has led.

Similarly, after Sarah adjusted her vocational aspirations to fit with her aptitudes and abilities, her occupational choices provided adaptive ways of resolving the over-arching tension in her life: the need to prove herself worthy. Her father provided the role model that gives direction for her life: helping others get well. Similar to other CEOs, as she progressed up through the corporate hierarchy, the occupational roles she assumed allowed her to resolve her life theme as she consistently delivered on projects she undertook. In the role of a CEO, she no longer needs to prove herself. She has reached the top: "I've proven that I can do this. It gets to the point when you know it's time to move on."

Keith's life theme developed out of the family dynamic: both his father and grandmother used intimidating behaviour to create a fearful environment. His motivational needs are change and understanding. His life goal is to help others succeed. His role
model was a professor who worked as a volunteer in one of the organizations that Keith
worked as a teenager.

The solution Keith found to his over-arching stressor from childhood was to be
instrumental in changing people's environments. From the time that Keith was an aquatic
supervisor to the present day, his occupational roles have given him the freedom to change
organizational structures from hierarchical models to people-centered ones. He began
meeting his life goal early in his life when he taught an elderly woman how to swim. His
mentor who became his role model provided the template for his leadership style and Keith,
like some of the other CEOs, has incorporated the solution to his life-theme into a positive
element of his leadership style.

Progressing upwards through the corporate hierarchy and attaining a position as a
CEO provided the means by which Allan could be self-reliant and find a life of adventure
that the small town environment in which he grew up failed to provide. He remarked: "There
are many people who worked for the same army for a long time, who are soldiers of fortune.
And we've enjoyed ourselves. We've had a lot of fun." Even the way that he views playing
golf reflects his goal in life: "Other people play with you but you are in charge of your shot.
Outside agencies might influence it like the wind or the rain, but there isn't anybody but you
influencing it and there isn't anybody to blame. If you don't have enough skill, you go to golf
school and learn some. But I think I look at that and say that kind of fits with all the things
that I view about having some disciplined, orderly way of conducting oneself in a world that
is fraught with uncertainty."

Looking at the data from a postmodernist perspective does suggest that the
occupational roles that these people selected were a determinant in attaining the position of
a CEO. As one would expect, the life themes are unique to the individual: stressors
develop in the childhood environment. However, the need for achievement was common to
four of the participants, and both the need for social recognition and the need for understanding was shared in common by two participants. Four of the CEOs had similar life goals: helping others.

The occupational interests of these participants were a means to find a solution to their life theme and to be engaged in work that is consistent with the attainment of their life goal. The resolution of their life theme was an underlying determinant in the attainment of a position as CEO. It was a means by which the tension from a negative aspect of their childhood was resolved, and in some cases, transformed into a positive element of their leadership style.

Summary

Imagine that a career is a journey, a journey that begins in childhood and ends with the attainment of a position as CEO of a major corporation. Just as there are many ways to get to Rome, there are many routes one can take that lead to the office of a CEO. From the stories of the nine participants in this study, only one had the office of CEO as the ultimate destination and even his road map did not clearly chart the way for him. It appears that these people arrived at the office via a random walk and the benefit of wise choices and good fortune.

What distinguishes these travellers? They are bright, intelligent people with the ability to look at the world from a wide variety of angles and to envision creative solutions to problems when they arise. High achievers, most of them had been that way since childhood. They love accomplishing things and have a reputation for doing this on a consistent basis. The work they performed on their journey was of outstanding quality and earned them a reputation that set them apart from other travellers on the highway. Although the journey took a number of years, they had the endurance to stick with it despite setbacks and disappointments.
These people are comfortable with themselves and don't pretend to be what they are not. Like all humans, they have existential problems. The work they performed on their journey helped them to work these out. The women who made the journey didn't put constraints on themselves or let others do so. They believed in themselves and their capabilities, possessed the same attributes for success as the men who made the journey, and arrived at the same place.
Chapter 6

Conclusions Limitations and Implications

Conclusions

The purpose of this study was to make explicit the factors which lead to the attainment of a position as CEO of a major corporation. One of the significant findings is the importance of self-concepts, particularly the meta-dimension of self-confidence. At some point, the participants saw themselves as being capable of handling the demands of the position. Although self-confidence is an important factor in attaining the position, it is developmental in nature. Self-confidence in their abilities to assume the role increased as they progressed through the corporate hierarchy.

Lent and Brown (1996) have suggested that people are likely to adopt and implement particular career goals for which they view themselves to be efficacious and which they perceive as leading to a desirable outcome. Further, there is a generally positive shift in the perception of the self as being competent as one makes a successful adaptation to the demands encountered in new roles (Mortimer, Lorence, & Kurnka, 1986). In their longitudinal study of AT&T managers, Howard and Bray (1988) found that self-confidence was one of the attributes which is predictive of advancement. However, it was a better predictor in the 20th year of one's career than at the beginning or at the 8th year.

Yukl (1994) also reports that the results of most studies on leader traits show that self-confidence is an important trait related to effectiveness and advancement. Kirkpatrick and Locke (1991) suggest that self-confident people view stressful events as opportunities for development and believe that they can influence the outcome. CEOs included in this study believe in the value of maintaining a positive attitude and several capitalized on opportunities that arose out of disappointments or setbacks.
Courage, self-reliance, and comfortableness in taking risks also distinguish the CEOs in this study. These can be viewed as constructs of self-confidence and as such are important attributes of a manager and leader (Kirkpatrick & Locke, 1991; Yukl, 1994). Yukl (1994) believes that self-confidence influences behavioural choices which in turn influence outcomes. Those with higher self-confidence are more likely to attempt difficult tasks and to set challenging objectives for themselves, be optimistic and persistent in efforts to accomplish a task or mission, and act decisively in a crisis where success often depends on the perception of subordinates related to dealing with problems. Leaders with low self-confidence are more likely to put off dealing with difficult problems. In a study of 253 managers preselected and rated as to their effectiveness, those deemed to be effective managers were found to have high levels of self-confidence as evidenced by a belief in their own ideas and ability, making proposals in a firm unhesitating manner, and by behaviour such as taking decisive action, rather than hesitating or vacillating (Boyatzis, 1982). However, as Yukl (1994) points out, it is a balance that is necessary. Excessive self-confidence makes a leader unresponsive to negative information and insensitive to dissenting views resulting in a failure to recognize flaws in his or her vision.

Leadership Traits

The premise that some personal traits are absolutely necessary for effective leadership has not been substantiated in several decades of trait research (Kirkpatrick & Locke, 1991). However, Yukl (1994) suggests that the most useful studies have been those that have attempted to identify how traits and skills are reflected in behaviours that explain why a person is effective in a particular managerial position or why the person is promoted to a higher position. In their review of the literature on contemporary leadership theory, Kirkpatrick and Locke (1991) posit that there are six core traits which are a precondition for becoming a successful business leader. In addition to self-confidence, discussed above,
the traits are a desire to put forth a high level of effort (ambition, energy, initiative), a desire to influence and lead others with a willingness to assume responsibility, honesty and integrity, cognitive ability, and knowledge of the business. The results of the present study suggest that the participants of this study exhibited these same traits prior to becoming a CEO of a major corporation. They demonstrated a commitment and dedication to their work, with a willingness to make personal sacrifices to achieve their goals when necessary. They had a passion for excellence and in most instances this was strikingly evident in their achievements from their elementary school years onwards. Personal integrity and accountability are values they hold. In a study of 1500 manager, Kouzes and Posner (1987) found that integrity and accountability were the most frequently mentioned values that managers look for and admire in their superiors. It is important that people sense that a leader has some basic principles and is willing to stand by them (Gabarro, 1987). Several of the CEOs included in this study did this, at the cost of their jobs.

Although one might think that academic achievements would be a strong predictor of successfully attaining the position of CEO, it is a reputation for consistently producing outstanding results that is a key determinant. However, it is interesting to note that during the time period when these CEOs entered the workforce, a university degree, especially a graduate degree, would have set them apart. As several of them mentioned, the degree opened the door to their first position in their chosen field. However, the situation is different today. As Harris, (1998) points out, there are now more than 650 colleges and universities in North America that graduate 70,000 MBAs every year.

What the CEOs did find valuable in their post-secondary education was the development of disciplined and rational thought processes, one of the core traits of effective leadership. Prior to becoming a CEO, the participants were engaged in tasks that required them to conceptualize problems from a multiplicity of angles, envision creative but practical
solutions, and inspire others to implement them. Stephen Covey (1971) states:

> Education’s main value does not lie in getting knowledge, much of which will be obsolete sooner or later. It certainly doesn’t lie in credits earned or degrees conferred. These may open doors of opportunity but only real competence will keep them open. … Education’s main value lies in learning how to continually learn, how to think and to communicate, how to appreciate and to produce, how to adapt to changing realities without sacrificing changeless values. Result? An inner confidence in the basic ability to cope successfully with whatever life brings” (p. 23).

As Drucker (1998) points out, being an educated person is no longer adequate, not even being educated in management. He believes that it is easy to fall into the trap of credentialism because degrees are black and white. But it takes judgement to weigh a person’s contribution. Today, survival in senior management positions is based on practical competencies: bringing resources together, the ability to “smell opportunity and timing”, empathy, and self-knowledge. He states that “in the new society of organizations, you need to be able to recognize patterns to see what is there rather than what you expect to see” (p. 181).

The CEOs also possessed the sixth trait that is a precondition to becoming an effective leader—knowledge of the business. At the time of their initial appointment to the position of CEO, all the participants were established in an organization, technical field, or sector in which they had gained considerable experience.

**Motivation**

Prestige and money do not appear to have been the motivating determinants that underpinned the occupational choices of these CEOs. Rather, occupational interests appear to have been the means to find a resolution to existential problems or tensions that developed during the years they were growing up. Thus, their underlying motivation in their work was underpinned by a need for achievement, social recognition, autonomy, affiliation, change, or a combination thereof. These CEOs valued positions of leadership for the
opportunities it afforded them to successfully meet challenges, make a difference in the lives of others, build relationships, facilitate change, and/or help others become successful.

As Simmons (1996) indicates, as human beings we experience many kinds of feelings. However, it is one’s ability to overcome and recover from the effects of past hurts which is critical to an individual’s effectiveness as a leader. Otherwise, one tends to give up on one’s self in many small and large ways. If a leader has low self-esteem and does not take themselves seriously, they will find it very difficult to function effectively as leaders.

**Interpersonal Skills**

Before assuming the position of a CEO, the participants in this study also demonstrated an ability to cultivate and maintain relationships. A significant number of the participants have relationships that extend back for more than forty years. As the authors of two of a recent spate of books on leadership have pointed out (Harris, 1998; Simmons, 1996), the roles of the manager and the leader have changed substantially in the new economy. “Organizations, if they are to survive, must begin to place people at the heart of everything they do (Simmons, 1996, p. 85.) Establishing and maintaining harmonious relationships is a vital component of being a successful leader in this environment. No longer is it acceptable to work from the perspectives of “the manager knows best”, “blame, criticism and attack” and “don’t bring me problems, bring me solutions.” (Simmons, 1996). In order to be successful, managers and leaders will have to make efforts to treat the people around them with respect, support, and encouragement. They will set up situations where they can draw out the best ideas and thinking and create the conditions that enable their staff to contribute their full intelligence, work together towards shared goals, and form effective, close working relationships with one another (Simmons, 1996). Several of the CEOs included in the present study indicated that when they were unit or divisional managers, they deliberately set about changing the environment from that of an autocratic,
hierarchical structure to one of the newer models, thereby increasing their effectiveness as a manager and hence their chances for advancement to higher positions.

**Career Socialization**

As predicted by Schein's (1978) career induction and socialization model and the career development theory of Super (1957), the primary environments in which the CEOs grew up provided an opportunity for them to have experiences in which they could develop skills, ascertain what interests them, and gain insight into their capabilities. Such experiences, self-assessment, and insight resulted in self-concepts that influenced their choices so that the decisions they made in regards to higher education and/or entry into the world of work were realistic. During the first years in the work force, they quickly became "an effective member" (Schein, 1978, p. 41) by making contributions to the organization. After a short time with an organization, they either made a decision to stay with the corporation or sought employment elsewhere in order to find an organization that would provide a more congruent match between their own needs and the constraints or opportunities of the organization. One could label the participants of this study as "pro-active" in the management of their careers. For those who stayed with one particular corporation, true to Hall's (1976) model of career growth within organizations, after a period of establishment, all the participants experienced a consistent period of growth. They continued to do so until they became a CEO. None could be classified as ever being in a state of "maintaining" their career by remaining for a long period in the same job, fearing the risk of change, or valuing job security.

**Advancement**

Whether the individual stayed with the organization or sought out opportunities with other corporations, it was their reputation for producing outstanding results that set them apart from others and was a primary factor in their advancement to senior positions, and
ultimately to the position as CEO. When promoting executives, it is the individual's prior performance record that tops the list of qualities that are sought among prospective candidates (Blake & Mouton, 1986; Rau, 1997; Useem, 1996). Drucker (1998) states that to get ahead the individual must shoulder the burden of defining what his or her own contribution will be—what is the greatest contribution that they can make to the company in the next eighteen months or two years. And after making that contribution, they must ensure that people in the organization know what they did.

Blake and Mouton (1986) also suggest a number of pathways to the executive suite besides a reputation for results. In addition to advancement by merit—merit being defined as "achieving bottom line outcomes with and through others and developing replenishable human talent over a long time horizon—the others are technical skills, although this is not very common, political skills, being a part of the old boy's network, being a protégé of a senior who in a parental way takes responsibility for one's advancement and being thrust into the top by circumstances. Although the literature suggests that mentors play a crucial role in the attainment of senior executive positions, not all the participants in the present study believed that having a strong mentoring relationship was critical to their attainment of a position as a CEO. However, in the early stages of many of their careers, mentors offered encouragement and provided opportunities for practical experience in the development of their leadership skills. In the current study, luck and happenstance played a role in the career advancement of about a third of the participants. However, as career theorists (Krumboitz, 1998; Cabral & Salomone, 1990) and career consultant (Wallach, 1994) point out, the consequences of such events would not have happened without some previous action on the part of the individual. These CEOs made choices that placed themselves in the right place at the right time to take advantage of these fortuitous events.
Gender Differences

Gender differences were negligible, a rather significant finding in the light of most literature on the career development of women. Several reasons may account for this result. (1) These women did not believe that they were inferior to men. As Simmons (1996) points out, women are conditioned and trained to settle for less than absolutely everything for themselves, for their lives, for themselves as leaders. These women did not settle for less or let others constrain them. (2) The traits that are preconditions of attaining a position of leadership were evident in their profiles. (3) The women earned a reputation for producing outstanding results: the first criterion that employers seek when hiring senior executives. (4) A case is being made in the literature on women's career development that women are intrinsically better suited to the style of corporate leadership that is practised today than men are. Women are supposed to be naturally more consultative, more caring and more liable to share power (Darling, 1994; Helgesen, 1990; O'Brien, 1998). The only notable gender difference in the present study was the females' perceptions of the educational requirements that were necessary to attain a position as CEO. All believed that they would not have attained the position without a graduate degree.

Sector Differences

There was one distinguishing difference in the profiles of CEOs who lead companies in the public and voluntary sectors. The majority of the participants in these sectors spoke about the astute political skills that are required to deal with boards of directors. It would appear that boards in these sectors have a tendency to interfere in the daily operations. This issue was either resolved before they accepted a position as CEO or shortly thereafter.

Drucker (1998a), writing in the Harvard Business Review in 1989, commented that it is becoming quite common for organizations in the not for profit sector to hire professional CEOs and to have professional CEOs on their boards. He also noted that the boards of
nonprofit organizations are more committed and active than those in the business sector because they have a commitment to the organization's cause, and typically, board members have served as volunteers themselves for a good many years, thus are deeply knowledgeable about the organization. Drucker points out that it is precisely for this reason that the relationship of the board with the CEO tends to be highly contentious and full of potential for friction. This has forced an increasing number of nonprofit organizations to realize that neither board nor CEO is "the boss." They are colleagues, working for the same goal but each having a different task. And boards have learned that it is the CEO's responsibility to define the tasks of each—the board's and his or her own.

If one were to choose the three most crucial factors leading to the attainment of a position as a CEO, these would be a healthy level of self-confidence in one's abilities, earning a reputation as a person who can achieve outstanding results, and taking charge of one's career.

Limitations

The data of this inquiry was gathered during a period of just over a year from a very small and select group of Chief Executive Officers. In accordance with the qualitative research paradigm, their selection was not carried out with a view to representing a larger population. All nine participants were purposefully selected because they held the position as CEO of a major corporation in Canada at the time the study was conducted. The only parameters placed on the sampling process were that three CEOs were to be chosen from each of the private, public, and voluntary sectors and at least one of the three participants from each sector was to be a woman. No attempt was made to match participants on any other defining characteristic such as place of birth, age, religious faith, marital status, length of tenure with a corporation or as a CEO.

Although the participants represented varied backgrounds and career paths, as
befits qualitative research methodology, the outcomes and conclusions of the study should not be generalized to other populations. Nor should any attempt be made to use the data to assess the appropriateness of any individual in relation to any aspect of employment, be that recruitment, promotion, or termination. Rather the conclusions that were reached are simply tentative conclusions on what factors lead to the attainment of a position as a CEO of a major corporation based on a synthesis of the data that emerged from the collated profiles of the personal and career histories of the participants.

There was no psychometric measurement of personality attributes. One can only determine from narratives whether there is evidence suggesting the presence of any specific attribute; one cannot comment on specific levels of it.

The interview data relied on retrospective accounts and people do not always accurately recall past events. Secondly, given the status of the participants and despite knowing that the data from the interviews would be kept confidential and details as to their identity would be modified to their satisfaction, they may have offered only what they considered to be socially acceptable information.

**Implications for Further Research and Practice**

If other researchers in vocational development were to use detailed life history profiles, where the data are made readily accessible to the reader, over a period of years, this particular domain in the literature could be rich in making explicit the "lived experiences" of people employed in various professions. Such data allows the reader access to the dynamic interaction of life events, social, economic, and cultural factors, and the personal attributes, beliefs, values, needs, impulses, motives, and satisfactions of the individual upon vocational choice.

In light of the finding that only one of the participants aspired to the position of a CEO at an early age, a study might be conducted to ascertain how common this
phenomenon is. If the results show that only a few CEOs purposefully aspire to this position, a further study could be conducted on life-themes. Such a study could examine the degree to which their occupational roles resolved their existential problem(s). In other words, are the career decisions one makes a way to resolve problems and stresses which arise in childhood or was this finding a function of the data of these CEOs? This approach could also be applied to individuals in other managerial or senior executive positions.

A number of further studies could enhance the generalizability of some of the findings of this study. Although the women in this study didn't believe that they needed to work any harder than men to obtain a position as a CEO, this finding may be a phenomena of chance due to small sample size, the size of the corporation of which they became a CEO, career decisions, and/or timing: possibly, the barriers that women encountered prior to the 1990s were not as pronounced as they had been in the previous three decades. A survey of women who have been recently appointed as Chief Executive Officers could be helpful in ascertaining which of these phenomena are at play. Another issue that warrants some investigation is the balance between work and family for men. It would appear that men in senior executive positions place a higher value on their familial relationships than is commonly believed. They may not be so willing to sacrifice personal relationships for the sake of career advancement. Is this shift an outcome of the changing corporate environment where people seem to be readily expendable at any level or a phenomenon of CEOs being appointed at a younger age?

A study of senior vice-presidents who are within five to seven years of retirement could be helpful in ascertaining differences between those who didn't quite make it to the top position and the participants of this study. Such a comparison could yield information as to the relative importance of the role of social contexts, self-concepts, career decision-making, and luck on attaining a position as a CEO. Future studies could then be conducted
with participants from small, mid-sized, and large corporations to ascertain whether there are differences due to corporate size.

**Implications for Counselling**

The results of this study should be useful to vocational counsellors, executive search consultants, and those engaged in human resource management within corporate environments. As one of the participants in the study commented, "Flowers that bloom get picked."

The conclusions reached in this study suggest that self-concepts are akin to the root of a plant. Without an adequate root, the plant does not produce a stem or flower. Similarly, without adequate self-concepts, people do not realize their full potential.

Therefore, when working with individuals whom they believe to have the potential to become a CEO, career counsellors and human resource professionals working within corporate environments should encourage them to realistically assess their skills and abilities, and to provide, whenever possible, opportunities to enhance their self-concepts. These could range from pointing out the strengths an individual possesses to become a CEO, as well as highlighting those areas in which he or she needs to develop, suggesting appropriate training programs, and/or encouraging management to provide on the job training or employment opportunities that would enhance their development.

From the root, grow the stem and the accompanying leaves that make the plant attractive. The decisions one makes in relation to one's career are akin to the stem. Self-confidence, ambition, energy and initiative, self-reliance and accountability, honesty and integrity, creative, practical, analytical and emotional intelligence are like the leaves. They make an individual attractive as a senior manager. Just as the growth of a plant cannot be forced, these elements must be nurtured in order to grow. Again, counsellors and human resource personnel can help an individual nurture their career by pointing out effective
career-decision strategies and encouraging the individual to seek opportunities for personal growth.

Given a healthy root and an environment in which the plant can grow, the bud appears and then the bloom. One's reputation for producing outstanding results, strong interpersonal and communication skills, self-assurance, decisiveness, courage, strong moral character, a positive attitude, and enthusiasm are the attributes akin to the petals of the flower. They are the attributes that make an individual attractive to executive search consultants and/or boards of directors so that he or she is picked for the position of CEO of a major corporation.

The results of this study could also be useful to counsellors working with clients who aspire to positions at a senior level within large corporations. Counsellors can help clients who have unrealistic expectations to appreciate that it is a developmental process that takes place over a number of years, that an educational degree will increase the likelihood of attaining such a position but there are other attributes which are a necessity: a reputation for consistently producing outstanding results, a passion for excellence, self-confidence in one's abilities, courage, and personal sacrifice, to name just some of them.

When working with clients in the process of making mid-life transitions to find greater satisfaction in their work lives, uncovering life themes could be helpful in identifying occupations or careers that would have a high likelihood of providing greater self-fulfillment.

The present study can assist those who counsel senior executives. An understanding of life themes would facilitate the identification of trouble spots. Psychologists are being retained by CEOs to overcome psychological blocks so that their organization does not suffer because of them. The above findings could be used as a starting point.

When working with clients on vocational issues, exploring life themes could be
helpful in bringing to consciousness issues that have remained unresolved from childhood, issues that could account for problems of rigidity, excessive expectations, fearfulness, low self-esteem, or confidence. Making these connections conscious might change a client’s career path or expectations.

As Harmon, (1994), Osipow (1994), and Savickas (1993) point out, career development theories appear to be divorced from career counselling practices. Although Super's (1957, 1963, 1981, 1990) theoretical frameworks are an integral part of career development courses at both the undergraduate and graduate levels, in my limited experience in career counselling settings, they do not figure prominently in the interventions that are used when working with clients. Yet, the findings of this study show the relevance of Super's theoretical construct of self-concepts to vocational development and the major impact they can have upon one's career. Although there is a movement to develop theoretical frameworks that integrate career development and career counselling interventions, vocational counsellors would be wise to begin mining the richness of the theoretical frameworks that are already in place: a few pointed questions in the area of self-concepts could yield material that could be beneficial in discussions with clients.
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Comment Re CEO Study


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Appendix A

Letter of Invitation to Potential Research Participants

Street Address
City and Province
Postal Code
Date

CEO's Name
Title
Organization
Street Address
City and Province
Postal Code

Dear Mr./Ms. __________________:

Recently, there has been considerable interest in the relationship between the personal attributes of the Chief Executive Officer and the performance of the corporation he or she directs. For my doctoral dissertation in Counselling Psychology at the Ontario Institute for Studies in Education (OISE/UT), I am conducting a study focusing on the personal determinants which initially lead to achieving the position of Chief Executive Officer of a major corporation. Specifically, it will focus on discovering the psychological factors that have contributed to an individual's successful attainment of a position of distinguished leadership.

As a Chief Executive Officer of a major corporation, you are cordially invited to participate in my study. You are one of a very select number of Chief Executive Officers who are being asked to participate. This invitation represents not only a unique opportunity for you to enhance your self-knowledge but also to contribute to a deeper understanding of what factors lead to the successful attainment of positions of status and power. This research should also provide insight into the challenges that men and women face as they strive to attain positions of eminent leadership.

I have designed the study to accommodate your scheduling needs and to make optimal use of the time you would contribute. The first part of the study consists of an interview, lasting about an hour, during which we would talk about some of your life experiences from the time you were growing up through to the present as well as some of your personal beliefs and values which you feel have contributed to your successful attainment of a position as Chief Executive Officer. On the basis of this interview, I would compile a preliminary personal profile of the factors which have led to your success. During a second interview, which typically would be thirty minutes in duration, I would carefully review this profile with you for the purpose of checking and refining its validity. I would then integrate your comments and further observations into a final profile, a copy of which I would present to you for final approval.
The time and location of both interviews can be arranged at your convenience. In accordance with the regulations of the University of Toronto, all aspects of my study have been examined and approved by an Ethical Review Committee at OISE. All data gathered will be kept strictly confidential. The names of all participants will be changed to pseudonyms known only to me. Any other potentially identifying references to individuals or institutions will be changed and heavily disguised to your satisfaction to ensure anonymity and confidentiality. The Interview Agreement Form which outlines the conditions under which the interview will be conducted is enclosed.

Should you wish any additional information, please feel free to call me at (905) 624-5864. Thank you for your time and gracious consideration of this request.

Yours very truly,

Douglas H. Schmidt, M.Ed.
Doctoral Student

Encl.
Appendix B

Thesis Supervisor's Letter of Introduction

OISE/UT Letterhead

Date __________________________

CEO's Name
Title
Organization
Street Address
City and Province
Postal Code

Dear Mr./Ms. __________________:

Enclosed is a letter from Douglas Schmidt, a doctoral student in Counselling Psychology at the Ontario Institute for Education of the University of Toronto, requesting your participation in his study of the attributes that contribute to the attainment of the position of Chief Executive Officer of a major corporation. The proposed study will constitute his doctoral thesis and will conform to the requirements for a Doctor of Education degree from the University of Toronto.

As supervisor of his research, I wish to assure you that Douglas will fulfil his commitment to protect and keep strictly confidential all data collected during interviews with you. The other members of his thesis committee and I consider his proposed research to be extremely promising in its potential to contribute to the understanding of what psychological factors lead to the successful attainment of positions of eminent leadership.

Both Doug and I would be most grateful for your generous support in making time available to participate in this study.

Sincerely yours,

Sabir A. Alvi,
Professor

Encl.
Appendix C

Interview Schedule

How do you view your role as the CEO of a major corporation?
What was it like for you the day you became a President and CEO?
Going back in time, would you describe the years you were growing up?
What were your interests or hobbies as a child?
Would you describe in some detail what you consider were some of your significant accomplishments by the age of 15?
What do you believe to be the impact of the values you learned during childhood upon your business career?
What were some of your significant accomplishments in high school and university?
What impact do you believe your formal education played in your attaining the position as a CEO?
Did you hold any summer or part-time jobs?
What were your primary considerations when you first decided on your career?
Was there a time when you consciously decided you wanted to become an executive of a large corporation?
Are there any accomplishments or decisions that might have influenced your attaining a position as a CEO?
Was there a person or event that you feel had a significant impact upon your decision to pursue a career as a senior business executive?
Did you have any mentors?
Are there points at which you believe you made significant decisions that impacted where you are today?
Looking back, were there any predictors in your life such as a statement in a school yearbook or a teacher’s comment?
What factors do you feel facilitated or hindered your career advancement?
If you had the opportunity to do it all over again, would there be anything you would do differently?
Would you speak about how your career aspirations impacted upon your other life roles as you pursued your career?
What suggestions would you give a young person today who is aspiring to be a leader of a major corporation?
How did you handle the good things that happen?
How do you handle failure and disappointment?
Now that you have attained the position of CEO, what are your future aspirations?
Appendix D

Interview Agreement Form

INTERVIEW AGREEMENT FORM

I agree to participate in a research study, the focus of which is on the personal determinants that lead to the successful attainment of the position of Chief Executive Officer of a major corporation. My participation will involve two tape-recorded interviews in which I will be asked about some of my life experiences from the time I was growing up through to the present as well as some questions relating to my personal values and beliefs. I understand that I am free to refuse to answer any specific questions which I choose not to answer.

I understand that I will receive feedback on my interviews and that any excerpts taken from these interviews, written or spoken, will disguise all names of persons and places so as to maintain confidentiality and preserve my anonymity and privacy.

Although most people would find the process engaging and worthwhile, I reserve the right to withdraw from the study at any time and to have all data provided by me returned to me.

Thank you for your generosity in making time available for my research.

__________________________
Signature of Interviewee

__________________________
Signature of Interviewer

__________________________
Date
### Appendix E

**Atlas-ti Final Coding List**

#### ATLAS-ti CODING LIST

<table>
<thead>
<tr>
<th>CHILDHOOD</th>
<th>MOTIVATIONAL NEEDS</th>
<th>VALUES</th>
<th>THEMES</th>
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<tbody>
<tr>
<td>Father</td>
<td>Abasement</td>
<td>Attitudes</td>
<td>Advice from CEO</td>
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<tr>
<td>Mother</td>
<td>Achievement</td>
<td>Beliefs</td>
<td>Awards, Scholarships</td>
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<td>Affiliation</td>
<td>Ethics</td>
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<td>Aggression</td>
<td>Values - Basic Human</td>
<td>Change - Other Initiated</td>
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<td>Autonomy</td>
<td>Values - Moral</td>
<td>Change - Self-Initiated</td>
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<td>Blameavoidance</td>
<td>Values - Personal</td>
<td>Context</td>
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<tr>
<td></td>
<td>Change</td>
<td>Values - Professional</td>
<td>Decisions - Other Initiated</td>
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<td>Contrariness</td>
<td>Values - Social/Political</td>
<td>Decisions - Self-Initiated</td>
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<td>Exhibition</td>
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<tr>
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<td>Interests and Hobbies</td>
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### Appendix F

**Matrix - Parents and Relatives**

<table>
<thead>
<tr>
<th>CEO</th>
<th>Father</th>
<th>Mother</th>
<th>Other Relations</th>
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</thead>
<tbody>
<tr>
<td>Allan</td>
<td>It's interesting that in the last twenty years or so, my father told stories about himself or his aspirations and how he would have liked to have done something else. And I guess my sense would be that he had some inherent desire for his children to achieve something greater than he did.</td>
<td>My mother wasn't employed outside the home. I spent many hours playing crokinole with my mother.</td>
<td></td>
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<tr>
<td>Andrea</td>
<td>My father moved into management at a very early age. He was just twenty-two years old. So he was really young. I would never forget my father's words. I've always worked at being the best. I had a good relationship with my dad. He was a little bit distant but he played a lot of sports with me when I was growing up. Left a lot of the decision making to my mom and most of the discipline except when I really messed up.</td>
<td>My mother stayed home and looked after the two children. But when they got married, he wouldn't let her work. My teenage years, particularly with my mom, were very difficult. We were always at each other. It was a Catholic home and she was very rigid. In hindsight, thinks she might have been stricter than she needed to be, but she didn't know that at the time. You never see her without a book in her hands and two of her interests are leadership and excellence.</td>
<td>I have one sister who is eight years older. We're very different. She's the more typical first child, I'm more the typical second child. And being eight years apart, I was always at an age that I was a real annoyance to her. She was the good girl. I was the bad girl. (laughs) She behaved and did what was expected of her. She never got caught smoking. She was very dependent on my mother and still is today. And I wasn't.</td>
</tr>
<tr>
<td>Cecile</td>
<td>My father, a civil engineer, ran his own company. A man I tremendously admire and a man of great hard work and dedication and integrity. My older brother and sister never had the same advantage of having as comfortable a relationship. My father had to play a bigger role in the home at a time when single parenting was not a common occurrence.</td>
<td>When I was quite young, my mother was diagnosed with a debilitating disease.</td>
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<tr>
<td>Dan</td>
<td>Education was one of the things my mother and especially my father worshipped. And he really had none. At most, he had eighth grade. But it's more likely, he didn't even have that. One of the things he wanted to do as a parent was to do everything possible so that his children were educated. So, I was sent to a rather prestigious private school. My father was an example to me. He always worked extremely hard. Although he had no education and his family was really poor, he became a very successful man. He started his career as a messenger of a brokerage house and rose to the level of principal partner. If I look at my career, a lot of my success is due to working hard, paying attention and committing myself to whatever it is I am working on.</td>
<td>My mother is an avid reader to this day. My mother was a nurse. I think I get more of my intellectual side from my mother. Although she too was a very positive and helpful person, she was more intellectually adventurous than my father was. She was very solid theologically, more thoughtful and reflective about her faith. She also was a very competent person who had a more realistic view of people than my father had.</td>
<td>My maternal grandfather was a Newfoundlander. When he moved to the states, he came with nothing. He went through a number of businesses and got his own steamship company, actually owned the ships. Dan's ethical standards are very high and are rooted in the Protestant ethics and values that were espoused and modelled by his parents and grandparents.</td>
</tr>
<tr>
<td>John</td>
<td>When he was twelve years old, he took over running the farm when his father had a nervous breakdown. I would say he was almost a classic workaholic. If I had any complaint, it's that he worked incredibly long hours. He ran two farms and a car dealership. I think my dad was a real inspiration to me, not just in the sense that he worked so hard, which is very true, but he had a wonderful positive view of life and I think that is one of the reasons for my energy and my positive attitude. It was fun to be with my dad and it gave me a better understanding of what he was doing.</td>
<td></td>
<td>My father's mother had a real heart for people. Although she was extremely overbearing, she had a wonderful love for people. My dad's father had my father's fire in some ways but there was something wrong with him that he got depressed as well and had a nervous breakdown. He had a great love for children and the grandchildren were always the most important thing in his life. My grandmother on my mother's side was also a very positive and encouraging person. She was a great friend and not afraid to speak her mind like my mother. She was married to a deeply spiritual man, who never had nervous breakdowns, but could be a rather depressive. He was almost paranoid that he was losing his faith, that somehow he wasn't good enough.</td>
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<tbody>
<tr>
<td>Keith</td>
<td>My father, a Captain in the Signal Corps, retired when he was only 35 years of age. I don't remember a lot about my father before we immigrated to Canada since he was away a lot of the time. What I recall are those times when we had fun together. I think he was more comfortable with an older child, somebody he could talk to or take fishing with him. As we went through our teens, the cottage became a focal point of the family and on weekends, we would go up to the cottage. We cleared the land and built the beaches together so it became sort of a working/bonding relationship. My father was never violent with my mother, but emotionally, he would prey upon people that were susceptible to allow themselves to be intimidated. And that came from his mother. There's no question about that. My father's style of parenting was leadership focussed and disciplined centered. He was not a person to whom one could easily relate because he did not spend a lot of time on the emotional side of his communication. He was very direct in a dictatorial, authoritarian way. My father would often try to intimidate me by instilling fear, the way officers learn to do in the army. But I wouldn't get angry and I didn't give him the emotional response that he needed to gain power over me.</td>
<td>My mother was extremely sensitive to people's needs. From her, I learned the strength of being people-centered. Since she was the opposite of my father, I had a good balance between them. As a child, I became my mother's protector. I began as a young guy and I've continued to do so throughout her whole life. Whenever she's been in difficulty, I've always been there to help her.</td>
<td>We then moved to another home located very close to where my father's mother lived. Now my grandmother was really the matriarch of my father's family and had a powerful influence over my father and my uncles. She was very much a fear monger and was very abusive in terms of intimidating people. So, she wasn't well liked.</td>
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<tr>
<th></th>
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<th>Mother</th>
<th>Other Relations</th>
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<tbody>
<tr>
<td>CEO</td>
<td>He was raised with his three brothers and two sisters by his mother</td>
<td>My mother decided to set up a store and was actually quite successful.</td>
<td>I had an uncle who was my mother's brother who had been very successful in business.</td>
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<tr>
<td></td>
<td>after his father left her: &quot;It was a subject that wasn't talked</td>
<td>Because my father travelled a lot, I've always been very close to my</td>
<td>My brother-in-law was doing his MBA and knew that the firm in which he had been</td>
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<td></td>
<td>about too much but my grandmother raised the six children while living</td>
<td>mother. She was the steady force at home. She was fun-loving and a real</td>
<td>employed during the summer was going to be hiring in their investment department.</td>
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<td></td>
<td>in a very small house, in very modest surroundings. They were all</td>
<td>go-getter. Our relationship was always very good.</td>
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<td>successful, although with one exception, none of them became</td>
<td>She gave me a lot of freedom. She's a sharp woman and perhaps, in a</td>
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<td></td>
<td>particularly wealthy. They didn't run up corporate ladders and</td>
<td>different generation, she would have been quite successful in big</td>
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<td>things like that. But they seemed to do well and always had the</td>
<td>business.</td>
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<td></td>
<td>respected of people around them. My father was extremely well liked</td>
<td>There were not many family arguments that I can recall either. So, it</td>
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<td></td>
<td>and a bit of a personality. Although he wasn't a comedian per se, he</td>
<td>was a reasonably healthy environment. We certainly weren't wealthy. I</td>
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<td></td>
<td>did have a natural kind of twinkle in his eye and people liked</td>
<td>think both my parents were always striving to improve their situation.</td>
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<td></td>
<td>being around him; Our relationship wasn't one that I would call close</td>
<td>I guess I am a combination of the qualities of both of them.</td>
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<td>if you based it on time because of the various business ventures he</td>
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<td></td>
<td>pursued and the strange hours he kept. But it was a good</td>
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<td>relationship. I do recall that even though he was fairly busy, he</td>
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<td></td>
<td>coached one of the hockey teams that I played on. I remember it as</td>
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<td></td>
<td>being good fun-time that we spent together. He used to enjoy fishing</td>
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<tr>
<td></td>
<td>and hunting and we would do that kind of thing together too.</td>
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</table>
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</thead>
<tbody>
<tr>
<td>Ron</td>
<td>My father was a carpenter when he lived in Germany. Although he was handy with wood, he didn’t like the work. So when he arrived in the US, he worked in a foundry until somehow, he became a butcher. One of the interesting characteristics about my dad was his determination to speak English fluently because he had to work across the counter. He’d come home dead tired and sit and read the newspapers to try and improve his English and to educate himself. He always worked hard and he set an example for me in that way, so that I didn’t know any differently. He really looked forward to those times when we would get together. He was very competitive and I think that’s where I got some of my competitiveness, always wanting to be the best or do the best or whatever. I had to fight my dad to go to high school and then I had to fight him to go to university if I hadn’t won a scholarship in a competition held by the local Catholic high school, I never would have gone. He didn’t think education was that important, possibly because he only had grade four. Although he didn’t support education, he wanted me to be the best and I was expected to study. When I was about eight, I got the bee in my bonnet that I wanted to learn to play the piano. But my father wouldn’t pay for the lessons, so I used to do babysitting.</td>
<td>My mother was softer, with interests more on the arts side of things. She loved music and enjoyed listening to a good orchestra, good singers and that sort of thing. My mother also enjoyed children and looked after young children in our home during the early days of childcare. With the state of her health, that’s about all she could do. We would play pinochle and sometimes my mother would join us and we would play three-handed cutthroat. I will remember how my dad, when he would pull out of the driveway, would always wave to my mom. They were an affectionate couple. My dad fought that in the worst way because I would be a couple of hundred miles from home. Somehow, I conned my mom into letting me go.</td>
<td>I had been staying with my grandmother so I was really looking forward to seeing my mother. My father-in-law took a great interest in what I did.</td>
</tr>
</tbody>
</table>
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</tr>
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<tbody>
<tr>
<td>Sarah</td>
<td>He was a busy physician but he became very busy after my mother became ill. He wasn't around for a lot of the things that I did. However, I never felt that he was too busy for me. I'm sure it was because of my father. I've always been close to him and I took an interest in what he did. When I was a kid, I loved to go with him. My father was someone who was, and still is, fun to be around. We've always had a lot of fun together. Some of our best times were probably on the golf course. We were very competitive. In the winter, we would play cribbage and things like that.</td>
<td>My mother was ill with Lupus and died before I was a teenager. My mother was able to look after herself fairly well until near the end and then she was in the hospital. My mother was also a health professional before she became ill. My desire to become a doctor may be somehow related to my mother's illness and death. Apparently, I'm identical to my mother. People who knew her then tell me all the time.</td>
<td>My father's brother, who lived down the street, was also a doctor. He and my father ran the practice together. I also have cousins who are doctors and other family members who are nurses.</td>
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## Appendix G

### Matrix - Significant People

<table>
<thead>
<tr>
<th>CEO</th>
<th>Educators</th>
<th>Role Models</th>
<th>Mentors/Supervisors</th>
<th>Friends</th>
<th>Associates</th>
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<tbody>
<tr>
<td>Allan</td>
<td>There were certainly a couple of teachers in that four or five room schoolhouse who would have encouraged me that I had potential to go to university. I had a math teacher who told me that I really ought to write the provincial exams and see if they would give me some money to go to university. The professor that I was working with was trying to encourage me to stay at school and do my masters.</td>
<td>There is a great quote from CEO Charlotte Beers. She sees the role as lifting people's hearts. That's exactly how I see it.</td>
<td>We all work for interesting people and they all contributed our understanding.</td>
<td></td>
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<tr>
<td>Andrea</td>
<td>I was very motivated by some of the teachers I had. Very early on I knew that I wanted to go on and do my masters degree in nursing. She challenged you to be better than you would otherwise ever be. She was a role model and I can't think of a single thing she ever did or said. It was who she was and she was this amazing awesome person that I wanted to be like.</td>
<td></td>
<td>The boss I had at the time was not a good mentor. She just supported anything and everything I did and I didn't know what I was doing. My bosses switched and I had someone who knew how to develop me as a front line manager.</td>
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<tr>
<td>Cecile</td>
<td>I think about Winston Churchill's dyslexia. He made it into something special.</td>
<td></td>
<td>I had the good fortune to work with consultants who both encouraged and required that. They encouraged me to synthesize, articulate &amp; conceptualize.</td>
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<tbody>
<tr>
<td>Dan</td>
<td></td>
<td></td>
<td>I've worked for some pretty fine people. There have been a whole series of people. I'm pretty focussed and but this is not a straight path. You are constantly being influenced by these people. And when I was Head of Operations, I worked for a guy who later became Chairman. He was a real gentleman and had a big influence on me because it was while working with him that I got my first experience of managing in the public sector. From him I learned to be extremely open. And it has worked for me and stood me in good stead.</td>
<td>A friend of mine worked for a railroad called me up and said they had a job for someone to be their budget guy.</td>
<td>I called up somebody I knew and I got hired.</td>
</tr>
</tbody>
</table>
## Appendix G

### Matrix - Significant People

<table>
<thead>
<tr>
<th>CEO</th>
<th>Educators</th>
<th>Role Models</th>
<th>Mentors/Supervisors</th>
<th>Friends</th>
<th>Associates</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>My typing teacher always thought I would lead something. I don't think that she was thinking of this necessarily, but that I would probably be an executive. I remember her saying this because it really caught me off guard because I never had that picture of myself at all. The guidance counsellor at the high school selected me to represent the high school at a state forum attended by students from across the state. ... there's obviously brighter kids here than I am but I'm in the league. I'm not out of my depth here. I started assisting this professor who was a film maker and that's probably where I really started moving into my strength as a communicator.</td>
<td>Various people who were involved in issues of equality, poverty. Missionaries who would speak at church or he would read about.</td>
<td>He was the person who really challenged me and wanted me to run for student body president. And in the end, I turned it down. But it was good that someone thought you had the ability to do that.</td>
<td>I've been blessed to work or be associated with some really great leaders and I learned things from all of them.</td>
<td></td>
</tr>
</tbody>
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## Matrix - Significant People

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</tr>
</thead>
<tbody>
<tr>
<td>Keith</td>
<td></td>
<td></td>
<td>He invited me to be part of his instructor courses and part of his training staff. I learned a lot about education philosophy. I would say that I probably learned a Ph.D. level of teaching adult learning from this individual. I've often wondered had I not Bill, if I would have been able to realize all those opportunities. The General Manager who hired me had very much the values that I had an interest and modeled them very well. My boss at that time was a brigadier general who was a brilliant man but had a crusty side.</td>
<td>He was a person that became a very close friend. He took an interest in us as kids and looked after my mother when my father was away.</td>
<td>I couldn't match the experience and education that I acquired from those who do volunteer work for the organization in any university.</td>
</tr>
<tr>
<td>Paul</td>
<td></td>
<td></td>
<td>A colleague of mine who lived in the states asked me to come down to see him for a period of time. When I was down there, he said I would like you to see a friend of mine who is working for a firm that is hiring.</td>
<td>Very fortunate to have a very fine mentor who was an executive vice president here. In later years, a chap who became president became a mentor when I was a branch manager. Perhaps, he's the reason why I am the CEO. He was the fellow who asked me to come down and become the VP of Finance.</td>
<td></td>
</tr>
</tbody>
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#### Matrix - Significant People

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</tr>
</thead>
<tbody>
<tr>
<td>Ron</td>
<td></td>
<td></td>
<td>I was fortunate in my first job out of university, my plant superintendent was a guy would push me and nudge me along. I had a couple of opportunity to work for a couple of hot shots out of New York that were again older and I had to observe their moves and what they did and didn't do. I've been fortunate in basically almost every case of having a fairly good mentor, somebody I respected and could learn from.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Sarah</td>
<td>My first two bosses passed me from one to the other. I now realize they really took me on as a protégé. I've always been fortunate to have people that I've worked for who were good role models but let me do my thing and so, let me figure out for myself how to do things and yet were always there.</td>
<td></td>
<td>...it's another variation on the mentoring theme because volunteers in this business are your bosses and I used them in a different kind of way. ...consultants with the organization who I have struck up varying relationships with and used as what I would call mentors. There were not many women in senior positions. I sought out whatever women I could find who had taken on jobs with some kind of link and we had dinner meetings where we talked about everything.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Appendix H

Matrix - Career Decisions

Growth Stage - Elementary School

<table>
<thead>
<tr>
<th>CEO</th>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allen</td>
<td>Wanted to become a doctor.</td>
<td>Watched Dr. Kildare on TV: loved the drama that goes on and all... the sick people who needed looking after.</td>
<td></td>
</tr>
<tr>
<td>Andrea</td>
<td>Wanted to become a doctor.</td>
<td>Always been a rail fan.</td>
<td></td>
</tr>
<tr>
<td>Dan</td>
<td>Wanted to become president of a railroad.</td>
<td>Wanted to play the piano and father insisted on him paying for his own lessons.</td>
<td></td>
</tr>
<tr>
<td>John</td>
<td>Did odd jobs to earn money.</td>
<td>Father and his brother were doctors and other family members were in medical field.</td>
<td></td>
</tr>
</tbody>
</table>
**Appendix H**

**Matrix - Career Decisions**

**Exploration Stage - High School and University Undergraduate**

<table>
<thead>
<tr>
<th></th>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allan</td>
<td>Wrote provincial exams to secure funds to attend university.</td>
<td>High school teacher suggested he write provincial exams so he could get scholarship money. Won scholarship.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enrolled in B Sc.</td>
<td></td>
<td>Interested in maths and sciences.</td>
</tr>
<tr>
<td></td>
<td>Worked two summers in the field.</td>
<td>Increase knowledge of the industry.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enrolled in M.Sc.</td>
<td>Encouraged by professor; long time to work after he graduates.</td>
<td></td>
</tr>
<tr>
<td>Andrea</td>
<td>Decided to be come a nurse.</td>
<td>Grades were not high enough for medical school.</td>
<td>Family expectation that she would go to university.</td>
</tr>
<tr>
<td></td>
<td>Accepted bursary from community agency.</td>
<td>Needed money to finance last year.</td>
<td>Committed to working for organization for one year.</td>
</tr>
<tr>
<td></td>
<td>Decided to pursue master's degree sometime in the future.</td>
<td>Motivated by some of her professors.</td>
<td></td>
</tr>
<tr>
<td>Cecile</td>
<td>Enrolled in B.Sc.</td>
<td>Family expectation that she would go to university.</td>
<td></td>
</tr>
<tr>
<td>Dan</td>
<td>Enrolled in business administration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>John</td>
<td>Enrolled in liberal college.</td>
<td>Wanted to broaden experience.</td>
<td>Found college very difficult because of anti-Christian sentiment.</td>
</tr>
<tr>
<td></td>
<td>Chose philosophy as major.</td>
<td>Had difficult time selecting major; Last minute choice.</td>
<td>Choice of philosophy not natural.</td>
</tr>
<tr>
<td></td>
<td>Worked in father's automobile business.</td>
<td>Summer job for two years.</td>
<td>Didn't enjoy it. Didn't feel he wasn't aggressive enough and socially out of his depth.</td>
</tr>
<tr>
<td></td>
<td>Worked as freight loader.</td>
<td>Summer employment.</td>
<td>Good experience—worked for really tough working class guys.</td>
</tr>
</tbody>
</table>
## Appendix H

### Matrix - Career Decisions

#### Exploration Stage - High School and University Undergraduate

<table>
<thead>
<tr>
<th>Name</th>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keith</td>
<td>Worked as a labourer in a plant, worked for a firm cleaning bush, worked as a camp counsellor—all during one summer.</td>
<td>Summer employment to earn money for university.</td>
<td>Working in the plant motivated him to make sure he didn’t end up in a similar type position. Won position as waterfront supervisor at camp.</td>
</tr>
<tr>
<td></td>
<td>Decided to get certified as swim instructor, life guard and subsequently trainer.</td>
<td>Enjoyed experience as waterfront supervisor.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Began doing volunteer work with the Y as swim instructor, trainer.</td>
<td>Interested in becoming a geologist which would combine his love of outdoors with his interest in the sciences.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enrolled in Bachelor of Science.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Continued to do work with Y and was part-time aquatics supervisor. Began to be promoted to higher levels of responsibility.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decided to take full-time position with Y in another city.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Finished 3rd year university.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Paul</td>
<td>Worked for three years, mostly as a labourer in a manufacturing plant.</td>
<td>Father died in his last year of high school; mother couldn’t afford tuition.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enrolled in Bachelor of Science with a business focus.</td>
<td>Parents were entrepreneurs. Business was often a topic around the dinner table.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decided to pursue an MBA.</td>
<td>Recessions period in the US and he wasn’t sure what he wanted to do.</td>
<td></td>
</tr>
<tr>
<td>Ron</td>
<td>Worked at many different jobs</td>
<td>Secure funds to pay for education.</td>
<td>Feels double degree has served him well.</td>
</tr>
<tr>
<td></td>
<td>Enrolled in chemical engineering.</td>
<td>Wanted to become scientist.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Enrolled in business administration.</td>
<td>Found out what scientists really do, didn’t think it suited his personality and he switched to business administration.</td>
<td></td>
</tr>
</tbody>
</table>
Appendix H

Matrix - Career Decisions

Exploration Stage - High School and University Undergraduate

<table>
<thead>
<tr>
<th></th>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sarah</td>
<td>Enrolled in Honours.</td>
<td>Wanted to become doctor.</td>
<td>Didn't give up on idea becoming a doctor.</td>
</tr>
<tr>
<td></td>
<td>Worked as probation officer.</td>
<td>Summer Employment.</td>
<td>Thought might return to school as a mature</td>
</tr>
<tr>
<td></td>
<td>Changed major to psychology.</td>
<td>Maths and sciences became increasingly</td>
<td>student.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>difficult; liked work as probation officer.</td>
<td></td>
</tr>
</tbody>
</table>
### Appendix H

### Matrix - Career Decisions

### Graduate School

<table>
<thead>
<tr>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allan</td>
<td>Enrolled in M.Sc.</td>
<td>Professor convinced him it was a good idea.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>In hindsight, it was good because there was a recession during this time period. Organization he is now with, didn't hire anyone during that period.</td>
</tr>
<tr>
<td>Andrea</td>
<td>Enrolled in Masters of Nursing Program.</td>
<td>Husband found work in a city that had a university with a master's program.</td>
</tr>
<tr>
<td></td>
<td>Decided that she wanted to teach. Offered position but turned it down.</td>
<td>Didn't feel had enough practical experience to teach.</td>
</tr>
<tr>
<td>Cecille</td>
<td>Enrolled in MBA.</td>
<td>Wanted to become university administrator.</td>
</tr>
<tr>
<td></td>
<td>Decided to complete part of MBA degree in French.</td>
<td>Believed that having an MBA and being bilingual would mean the world would be her oyster.</td>
</tr>
<tr>
<td>Dan</td>
<td>Enlisted in Navy.</td>
<td>Basic leadership training.</td>
</tr>
<tr>
<td></td>
<td>Enrolled in MBA.</td>
<td>Get best training possible.</td>
</tr>
<tr>
<td></td>
<td>Worked on a part-time basis for his uncle.</td>
<td>Earn funds.</td>
</tr>
<tr>
<td></td>
<td>Assisted professor in filmmaking project.</td>
<td>Summer employment for two summers.</td>
</tr>
<tr>
<td></td>
<td>Took summer job in communications with humanitarian organization.</td>
<td>Professor on sabbatical.</td>
</tr>
<tr>
<td></td>
<td>Decided not to be ordained.</td>
<td>Didn't feel called to be ordained, wasn't sure he wanted to be an Episcopal priest.</td>
</tr>
<tr>
<td>Keith</td>
<td></td>
<td>Felt comfortable here—found passion for life.</td>
</tr>
<tr>
<td>Paul</td>
<td></td>
<td>Dubbed tapes for radio distribution.</td>
</tr>
<tr>
<td>Ron</td>
<td></td>
<td>Felt moving into strength as a communicator.</td>
</tr>
<tr>
<td>Sarah</td>
<td>Enrolled in Masters of Social Work.</td>
<td>Enjoyed social work.</td>
</tr>
</tbody>
</table>
Appendix H

Matrix - Career Decisions

Establishment Stage

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<tr>
<th>Decision</th>
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<tr>
<td>Allan: Decided to accept offer from firm with whom he had been</td>
<td></td>
</tr>
<tr>
<td>during the summer before doing his masters.</td>
<td></td>
</tr>
<tr>
<td>Held a number of positions in engineering and finance.</td>
<td>Promotions.</td>
</tr>
<tr>
<td>Accepted position as President of one of the company's divisions.</td>
<td>Promotion.</td>
</tr>
<tr>
<td>Accepted position as Executive VP and Chief Operating Officer.</td>
<td>Promotion.</td>
</tr>
<tr>
<td>Appointed CEO.</td>
<td></td>
</tr>
</tbody>
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<tr>
<td><strong>Andrea</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Worked as community health nurse for a year.</td>
<td>Requirement of university funding.</td>
<td>Worked for three years in this position. Knew after a new manager was appointed that she wanted and put “teaching” on hold.</td>
</tr>
<tr>
<td>Took position in large hospital as a staff nurse.</td>
<td>Get experience so she could teach.</td>
<td></td>
</tr>
<tr>
<td>Secured position as head nurse position in opthamology.</td>
<td>Resigned as staff nurse after a year because she thought she could do better job than head nurse.</td>
<td></td>
</tr>
<tr>
<td>While on maternity leave, took ICU courses.</td>
<td>To upgrade skills; wanted to feel more comfortable in the job.</td>
<td></td>
</tr>
<tr>
<td>Taught part-time while on maternity leave.</td>
<td>After taking course, college asked her to teach on a part-time basis.</td>
<td></td>
</tr>
<tr>
<td>Staffed ICU unit on evening shift for two years.</td>
<td>Wanted to work evenings so she could be home with children.</td>
<td></td>
</tr>
<tr>
<td>Applied to another hospital for a middle management position—got job.</td>
<td>Decided to seek day job in management.</td>
<td>While in this position, moved through four or five management positions. Had applied for several VP positions, was always short listed but never was awarded a position.</td>
</tr>
<tr>
<td>Secured position as VP at a new hospital.</td>
<td>Had wanted this position from the time she saw press article.</td>
<td>Took five years before they hired staff for nursing.</td>
</tr>
<tr>
<td>Accepted appointment as CEO.</td>
<td>CEO resigned during construction of hospital.</td>
<td></td>
</tr>
<tr>
<td><strong>Cecille</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>joined public organization.</td>
<td>Government looking for bilingual MBAs.</td>
<td></td>
</tr>
<tr>
<td>joined management consulting group.</td>
<td>Passed over for promotion because of a mistake she made out of naiveté.</td>
<td></td>
</tr>
<tr>
<td>joined public sector organization as a VP for planning department.</td>
<td>Career Opportunity</td>
<td></td>
</tr>
<tr>
<td>joined organization in private sector as VP.</td>
<td>Believed chances good of becoming CEO.</td>
<td></td>
</tr>
<tr>
<td>Appointed as CEO</td>
<td></td>
<td></td>
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<tr>
<td>Dan</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hired by railroad to work with a group on merger studies. Moved into market department.</td>
<td>First position after graduation.</td>
<td></td>
</tr>
<tr>
<td>Joined another railroad which subsequently merged.</td>
<td>Fired from previous job after disagreement over management issue. Called up someone he knew and was hired.</td>
<td></td>
</tr>
<tr>
<td>Resigned to travel through Europe.</td>
<td>Found himself with nothing to do in organization, so resigned and decided to travel to Europe.</td>
<td></td>
</tr>
<tr>
<td>Joined another railroad to fill vacancy in budget dept.</td>
<td>After returning from Europe, a friend introduced him to someone in the organization that he worked for.</td>
<td></td>
</tr>
<tr>
<td>Joined another organization to run commuter rail division.</td>
<td>Promotional Opportunity - organization wanted him to join them to fix problems.</td>
<td></td>
</tr>
<tr>
<td>Accepted position to run another division.</td>
<td>Freak accident occurred and he was asked to run that division.</td>
<td></td>
</tr>
<tr>
<td>Accepted position as Operations Manager.</td>
<td>Career Opportunity.</td>
<td></td>
</tr>
<tr>
<td>Resigned position.</td>
<td>Disliked the type of people that were elected to board.</td>
<td></td>
</tr>
<tr>
<td>Joined organization as CEO.</td>
<td></td>
<td></td>
</tr>
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**Matrix - Career Decisions**

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</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>Joined organization as Media Programmer.</td>
<td>Worked with organization during summers.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Became Creative Director.</td>
<td>Creative Director returned to school.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Appointed Director of Communications.</td>
<td>Didn't really want to take this position. Convinced when told that this position is &quot;being a voice for those with no voice.&quot;</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Requested transfer to foreign office.</td>
<td>Needed more challenge.</td>
<td>Out of the blue decision to apply for this position.</td>
</tr>
<tr>
<td></td>
<td>Transferred to Canada; appointed to position of VP.</td>
<td>Had accomplished what had to be done. Felt chances of becoming president there were not very good.</td>
<td>Had looked at some things outside of the organization but nothing clicked. President from Canada always joked with him about coming to Canada. &quot;Taking this position was going against the grain a bit.&quot;</td>
</tr>
<tr>
<td></td>
<td>Accepted appointment as Executive Vice-President.</td>
<td>Took position despite feeling that being a COO was not one of his strengths.</td>
<td>Learned a lot while in this position.</td>
</tr>
<tr>
<td></td>
<td>Appointed CEO.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keith</td>
<td>Secured position as Provincial Director of a unit of a large charitable organization.</td>
<td>Recruited by executive search firm; promotional opportunity.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Promoted to Regional Executive Director.</td>
<td>Accepted although concerned he was getting to be &quot;typed cast&quot;.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Answered recruiters ad for position out west.</td>
<td>Girl friend moving to west coast. Didn't get position. CFO got it.</td>
<td>Knew he wanted a national organization.</td>
</tr>
<tr>
<td></td>
<td>Accepted position as CEO.</td>
<td></td>
<td>Remembers telling them that my aspiration was to be a CEO of a major charity.</td>
</tr>
</tbody>
</table>

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Appendix H

Matrix - Career Decisions

Establishment Stage

<table>
<thead>
<tr>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul Joined firm as a sales representative.</td>
<td>Unsuccessful at finding a position with a bank. Friend introduced him to someone who worked for a firm who were hiring people.</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Joined insurance firm as a financial analyst.</td>
<td>Green card was expiring. Didn’t particularly like sales job. Always enjoyed investment side of things.</td>
<td></td>
</tr>
<tr>
<td>Decided to move from investment side of business to insurance.</td>
<td>After an extensive corporate evaluation program, senior executive approached him to consider moving into insurance side of business.</td>
<td></td>
</tr>
<tr>
<td>Accepted position as Branch Manager.</td>
<td>Promotion.</td>
<td></td>
</tr>
<tr>
<td>Accepted position as VP of Finance.</td>
<td>Promotion.</td>
<td></td>
</tr>
<tr>
<td>Accepted position as Executive VP.</td>
<td>Promotion.</td>
<td></td>
</tr>
<tr>
<td>Appointed President &amp; CEO.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Brother-in-law passed on information that the firm he had worked for during the summer was looking to hire people.
### Appendix H

**Matrix - Career Decisions**

**Establishment Stage**

<table>
<thead>
<tr>
<th>Ron</th>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Accepted job as process engineer.</td>
<td>First job out of university.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decided to work for consulting group in logistics</td>
<td>Resigned previous position because things moved to slow in industry.</td>
<td>Good opportunity despite president bragging about how many vice-presidents he had fired.</td>
</tr>
<tr>
<td></td>
<td>management.</td>
<td>Always fascinated by logistics and numbers.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decided to accept offer from firm to implement plan</td>
<td>Good opportunity despite president bragging about how many vice-presidents he had fired.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>he had developed as a consultant.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Decided to compete for position as President and</td>
<td>Had problems with co-workers because of president's handling of situation.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>CEO of a trucking firm company had purchased.</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accepted position as head of parent company</td>
<td>Transferred back because of success in turning trucking firm around.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accepted position with family owned trucking firm</td>
<td>Fired from previous job over financial dispute.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>as CEO.</td>
<td>Saw ad for position.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accepted position as CEO of a large subsidiary of a</td>
<td>Company looking for someone and they recruited him.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>national transportation company.</td>
<td>Fired from last position over dispute with President.</td>
<td>Also looked at running his own company but decided against it.</td>
</tr>
<tr>
<td></td>
<td>Accepted position with public sector firm as CEO.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
# Appendix H

## Matrix - Career Decisions

### Establishment Stage

<table>
<thead>
<tr>
<th>Decision</th>
<th>Reason</th>
<th>Commentary</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted position as social worker in psychiatric clinic in a psychiatric clinic in a juvenile court.</td>
<td>Career Opportunity.</td>
<td></td>
</tr>
<tr>
<td>Took position to head up first volunteer program of a provincial government ministry.</td>
<td>Wanted the experience.</td>
<td></td>
</tr>
<tr>
<td>Decided to travel around world.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Did temporary work for a period of six months.</td>
<td>Job market had bottomed out.</td>
<td></td>
</tr>
<tr>
<td>Took a position with non-profit organization in home support services.</td>
<td>Career Opportunity.</td>
<td></td>
</tr>
<tr>
<td>Accepted a position as a policy analysis with provincial government.</td>
<td>Interested in policy at that time.</td>
<td></td>
</tr>
<tr>
<td>Joined charitable organization and was responsible for one of the larger services.</td>
<td>Career Opportunity.</td>
<td></td>
</tr>
<tr>
<td>Held several positions until she reached the second highest position.</td>
<td>Promotions.</td>
<td></td>
</tr>
<tr>
<td>Decided wanted top position. Used recruiter.</td>
<td>Wanted the top job instead of making someone else look good.</td>
<td></td>
</tr>
<tr>
<td>Joined another charitable organization as Executive Director.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Decided to turn down CEO position.</td>
<td>So involved in restructuring, didn't feel she wanted the position at that time.</td>
<td></td>
</tr>
<tr>
<td>Board offered CEO position again. Decided wanted to compete for it.</td>
<td>Didn't want appointment to be one of convenience.</td>
<td></td>
</tr>
<tr>
<td>Appointed CEO.</td>
<td></td>
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</tbody>
</table>
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kolrpueui slv 'meehMJI leqaour ul lunj jo 10) e pwq e~,el(n'seAooJno peho[ue
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er%mje41 slu!ql esoq 10 Aue 'pejul ~ d o q ce un1 JO reuuej s eq 0) luem 1 plnom 11qm os

suo!leJlsnlll


**Appendix I**

**Matrix - Life Themes**

<table>
<thead>
<tr>
<th>CEO</th>
<th>life theme / stressor</th>
<th>motivational needs</th>
<th>value / goal</th>
<th>role models</th>
<th>occupational interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrea</td>
<td>freedom from constraints</td>
<td>need for social recognition</td>
<td>helping others; making a difference in people's lives</td>
<td>Dr. Kildare</td>
<td>doctor, nurse, teacher, manager</td>
</tr>
<tr>
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</tbody>
</table>

**Illustrations**

- My mother would tell you that I was always a rebel. I was a real handful for her when I was a teenager; She was the good girl. I was the bad girl. (laughs) She behaved and did what was expected of her. She never got caught smoking. She was very dependent on my mother and still is today. And I wasn't; In high school, I was pretty disruptive in class; I was a leader in a negative way; ...hearing from people on the front line saying, 'My God, is she shaking this place up!' But I'm already freeing some highly talented people from the constraints ..........

- I'd have to say I got a lot of attention by skipping a grade and getting high marks. People used to say, 'Oh she's going to be a leader' and I liked that. So, I would have to admit that I liked it and I seek it out now; There were very few women in Canada that had a master's degree in nursing. Again, I stood out and I liked that. I don't mind admitting that;

- I love this job, not because of the title...... It's what it allows me to do that I love, because I can make more of a difference out of this office for patients than I even could at the bedside; I could never be in the private sector working in a for-profit environment. I do what I do because it makes a difference for sick people; the ultimate inspiration would be to make a difference in the lives of children who are sick. So I would like to take what I am doing, in terms of making a difference, and do it in a children's hospital

- Ever since Dr. Kildare was aired on television, Andrea knew that she wanted to work in this type of environment. "Whatever it is I was going to do, it would be in a hospital where all that drama was going on. I was so in awe of people who looked after sick people and I wanted to be one of them.

- She was intellectual. She had an ability to be with people. She challenged you to be better than you would otherwise ever be. She was just this amazing, awesome person that I wanted to be like. Outspoken, intellectually challenging, and in the end, took a real stand for nursing and patient care.
Appendix I

Matrix - Life Themes

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<th>occupational interest</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cecile</td>
<td>social isolation</td>
<td>social recognition/achievement</td>
<td>creativity (???)</td>
<td>Winston Churchill (???)</td>
<td>administrator, anything interesting</td>
</tr>
</tbody>
</table>

Illustrations

- So it was an environment where I was pretty independent but solitary; I was far and way the least popular girl in my grade five class; I remember I had a route to school that I tried to keep as safe as possible because I would read a book on the way.

- Although I didn’t always succeed, I aspired to be at the top of the honour role or at the top of the class. I remember a year when I had a collection of one hundred percent exams that I kept in a box in my desk. Four of the eight pictures I submitted won first place and two of them placed second. At the time, I was very proud of that achievement;

- Now, I don’t think I’m a genius but I do think that I have a gift of seeing what everyone else sees but thinking something different; And after winning, I remember wondering whether I had won because it had appealed to the judges that someone in grade four or five was trying to think in abstractions. Since this was in the fifties, it would have been quite exceptional; My creative contribution has been to focus them and to give them a vision.

- Winston Churchill. He made being dyslexic into something special by increasingly relying on the spoken word and on communication through words.

- I had to think about something interesting that I could do, so I pursued an MBA, thinking that would be an achievement; “...that sounds pretty interesting. So we went off and ....added to our MBA the bilingual dimension; So that’s pretty indicative of an awful lot of my twenties. I would find myself something sort of interesting to do in the situation I was in; To a certain extent, a lot of my career has been about doing interesting things; It would be interesting to take time out and write a book.
### Appendix I

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<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>John</td>
<td>finding God's will for his life</td>
<td>achievement</td>
<td>social action / helping others</td>
<td>father</td>
<td>You have to do what you believe God is calling you to do, not what others want you to do or think you should do. Hopefully, there will be some symmetry in the two, but in the end, the important thing is to do what you believe you are being called to do.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>understanding</td>
<td></td>
<td>grandmother</td>
<td>I've always been pretty highly motivated. I've always liked pushing myself and seizing the next challenge. I think it's been a style in my working life that has been important to my success. I've always had ambition at a certain level. I've always been challenged by what I am doing.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>social activists</td>
<td>I think when I got to seminary I really touched the passion that drives my life, which is to try to understand the ways of God better and be empowered in some way to express that.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>church leaders</td>
<td>There's always been a sort of social action bent to my interests. I've always had a concern about racism and poverty.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>occupational interest</td>
<td>....his enthusiasm, his positive regard for people and things, always interested, always prepared to do something for somebody else. He just had a passion for that. So I think I'm locked into that in some ways.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>communications, leadership</td>
<td>My father's mother had a real heart for people. Although she was extremely overbearing, she had a wonderful love for people. She was such a committed person.</td>
</tr>
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<td></td>
<td></td>
<td>.......who was very opposed to slavery; I was also influenced by Tom Skinner, ....very committed to a Christianity that dealt with social issues as well as spiritual issues.</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>It was a much more liberal church than I was accustomed to. When I say, liberal, I just mean, their priority was pretty strong on the social action side, not as much on the spirituality side of things. that they are sincere people and that's its definitely unfair to say they are not Christians because they don't sort of believe this way or that way its pastor had been an outspoken advocate against American involvement in the Vietnam War, against racism and a strong supporter of nuclear disarmament and the South African situation.</td>
</tr>
</tbody>
</table>
### Appendix I

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<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Keith</td>
<td>living in an environment of intimidation (father/grandmother)</td>
<td>...emotionally, he would prey upon people that were susceptible to allow themselves to be intimidated. And that came from his mother. There’s no question about that. He learned from a master and of course, the military encouraged that even more with their style of leadership being primarily one of intimidation; My father’s style of parenting was leadership focussed and disciplined centered.....when he asked you, he wasn’t very polite; she was very much a fear monger and was very abusive in terms of intimidating people.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>motivational needs</th>
<th>change</th>
<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Even as a camp counsellor,” he remarked, “I was always wondering how we could make things different; If I’ve been in a job six months, I will have already created some change and some development.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>value / goal</th>
<th>helping others succeed</th>
<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>...this fondness for asking questions and challenging the status quo; But as I worked with all these people, I just kept asking questions like 'Why?'; 'I did it because I had an inquisitive nature, a curious nature.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>role models</th>
<th>professor / trains the trainers on volunteer</th>
<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>So by the time I was eighteen, I was teaching adults how to swim at the local Y. I gained the ability to influence people so that they achieve success. That has really carried on throughout my whole life. As I became a manager and then a director, I took that basic skill set and that ability to help people succeed and kept adding to it; If you are a good teacher, you set up a framework for success. If you are a good manager, you do the same; It's what we do to that individual in the job that determines whether or not they will be successful.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>occupational interest</th>
<th>geologist; supervisor / manager</th>
<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>He was, by far, the strongest influence in my life. He taught me a lot about teaching and learning styles, presentation techniques, how to communicate in front of a group and how to relate to different types of people. I got it all at the age of eighteen from a master who was a very, very brilliant man.</td>
</tr>
</tbody>
</table>
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<th>occupational interest</th>
<th>Illustrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Paul</td>
<td>being successful</td>
<td>achievement</td>
<td>building relationships</td>
<td>successful businessman</td>
<td>I always felt that I would be successful at something. I wasn't sure what the hell it was going to be; I wasn't sure that I would be able to succeed at both and so I declined the scholarship; [My university experience] confirmed that when I put my mind to something and get going, it tends to be quite rewarding; after I always play to win. It's the same in business. I had been in that job for a while and I was doing very well, 'Oh my God, what a way to spend your life [as salesperson] You are only as good as last month; I am the type of person who likes to build on a solid foundation and I wanted to build my career on substantive accomplishments and work activities; I like the score card of business and the success that comes with increased financial returns to the shareholders. The power of what I am is in my accomplishments and the relationships I have established; I made a lot of friends in the community and in the schools. Just a month ago, my oldest friend came in to see me; It was also the first opportunity to begin to change the culture of the organization from the hierarchical model that was in place to one of relationship building' I think what I like most about leadership is the building of the relationships with the people who work in the company; I do remember as a young boy getting punched in the nose defending a young kid who had immigrated to Canada.</td>
<td></td>
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</tbody>
</table>
## Appendix I

### Matrix - Life Themes

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</thead>
<tbody>
<tr>
<td>Ron</td>
<td>not measuring up</td>
<td>He [father] wanted me to be the best and I was expected to study. If I got a B+, he would ask why it wasn't an A. Or if I got an A, how come it wasn't an A+? As a child, it was always how fast, how far, how high; always trying to be a little bit better than my previous best and that sort of thing, that's been a great driver in my life; every time I took a position in the private sector as a CEO because working for incentives really turns me on and I'd work my buns off; I'm a measurement freak....... As a child, it was always how fast, how far, how high. I guess that's the sports side of me. I was always trying to be a little bit better than my previous best and that sort of thing. That's been a great driver in my life.</td>
</tr>
<tr>
<td></td>
<td>social recognition</td>
<td>I really appreciate it when somebody says, 'Well, you've done a good job.' It means a lot to me; ......it always came out of my hide to try and deliver. I never knew whether he gave me enough credit for what I did; I had the feeling that I just didn't want to go through life putting reports on shelves with nothing happening with my ideas.</td>
</tr>
<tr>
<td></td>
<td>understanding</td>
<td>I also enjoy reading. A lot a people kid me because I'm such a voracious reader. I read all kinds of books; one of the things I do, and have always done, is sort of drill down to bedrock on any subject or part of the organization I don't understand. And so over the years, I've learned things about marketing, accounting and the whole human resources thing.</td>
</tr>
<tr>
<td></td>
<td>achievement (???)</td>
<td>When I was about eight, I got the bee in my bonnet that I wanted to learn to play the piano... By the age of thirteen, I was playing difficult pieces; Things just didn't move fast enough for me in the chemical industry and everything had been done a hundred years before;</td>
</tr>
<tr>
<td></td>
<td>sports heroes (???)</td>
<td>I loved baseball and football and was always sorry I couldn't be some kind of sports hero.</td>
</tr>
<tr>
<td></td>
<td>scientist, businessman</td>
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</table>

value / goal

role models

occupational interest
Appendix I

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</thead>
<tbody>
<tr>
<td>Sarah</td>
<td>lack of self-confidence/need for validation</td>
<td>I’ve always had a certain lack of self-confidence and maybe that’s also a part of it. Simply, I feel I must do it all and do it all right or someone will find out that I’m the great impostor; I didn’t want the appointment to be a question of convenience. I wanted to compete for it. So I entered the competition and won the job.</td>
</tr>
<tr>
<td></td>
<td>achievement</td>
<td>[On being approached to consider becoming CEO] There was just no way I could or wanted to leave it. I wanted to see things through to completion; the fact that I made it happen has meant that this division has a very healthy financial situation to this day and people still come back and say it’s because of the work I did.</td>
</tr>
<tr>
<td></td>
<td>helping others</td>
<td>I was there helping the supply teachers instead of creating problems behind their backs; I would like to do volunteer work that is directly related to people. I have missed this.</td>
</tr>
<tr>
<td></td>
<td>father</td>
<td>From him, I learned the value of hard work and commitment whether that is to one’s family, business or community. I also learned the relative importance of people and money. That he might not get paid didn’t matter to him. He would first help them and then figure out whether they had the ability to pay. And from these types of experiences, I learned that ultimately you get back a whole lot more than you give. It’s just that the rewards are different.</td>
</tr>
<tr>
<td></td>
<td>doctor, social worker</td>
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</table>