

Alison Whitmire: Welcome, everyone. Welcome to Learning in Action's Podinar series, this month on mindfulness coaching, The New MBA: Mastering Being and Awareness, with our special guest, Dr. Steve Romano. Our intentions for today are for you to experience mindfulness just the way that you would introduce it to a client. You're going to learn how to promote and introduce and utilize mindfulness with your coachees. You're going to get to explore this idea of being and awareness. What is it and what are the results it produces? Then we're going to review a six point transformational model for coaching. It's exciting stuff.

Alison Whitmire: So hey, I'm Alison Whitmire. I'm the President of Learning in Action. I'm joined today with Kris Harty, our Director of Brand, Community and Customer Care and the producer of our Podinar series.

Kris Harty: Hi, all. Thanks for joining us.

Alison Whitmire: Kris is going to be moderating today. She'll be watching the chat box listening to you, wanting to make sure your voice gets added to ours today. So what the heck's a Podinar? We made it up. It's the best parts, we hope, of a podcast and a webinar. It's interview style like a podcast and it's interactive like a webinar, and we want to hear from you. We love interacting with you.

Alison Whitmire: Why do we do Podinars here at Learning in Action? We genuinely believe in supporting this community, this community of people who work with leaders, teams, organizations to create positive transformational change. We want to inspire you. We want to inform you. We want to be the battery charger to help you do you even more, even brighter.

Alison Whitmire: We want to hear from you. Please feel free to chat, chat, chat whatever you want to chat about in the chat box. Chat to each other. You can chat to us. Whatever you're thinking we'd like to hear from you. One thing, make sure if you want to chat with the rest of the audience, and we hope you do, that you click the arrow button on the chat and turn it to all panelists and attendees, because the default setting is all panelists. Then it just goes to Steve and I.

Alison Whitmire: If you want to ask a question, you can put that in the Q&A box, and if you put your question in the Q&A box versus the chat, I'm more likely to see it faster and therefore more likely to get to it in the moment, especially if it's bite sized and clear and digestible. We can get our arms around it. That's great.

Alison Whitmire: We'll have a poll at the end asking you how we did today, because we love feedback. We want feedback. So just submit the answer to the poll.

Alison Whitmire: Enough about the administrivia. I'm so happy to be with you today, Steve.

Steve Romano: Thank you, Alison. I am too.

Alison Whitmire: Yeah. For our audience, Steve is the managing director of Olistica Center for Sustainable Leadership. He is an executive coach, facilitator, and speaker. He's got a Ph.D. in leadership and change and is an adjunct professor at Alliant International University in San Diego, and his mantra is to lead well, be well, and thrive. Yeah, to be living that. Hi, Steve.

Steve Romano: Hi, Alison. Thank you so much.

Alison Whitmire: That makes me happy just reading it.

Steve Romano: Excellent. Gets me excited too.

Alison Whitmire: We would love for you to start us out today in this hour long time together with some kind of mindfulness practice, one that you would do with a client, and if you could tee it up how do you tee it up with your client, what do you say? Just say it to us just like you'd say it to a client. [crosstalk 00:04:34] and what would you do?

Steve Romano: Okay, great. That's an excellent question. I love it, and I love actually just diving into this right away. Welcome, everybody. I'm so excited to be here and I hope you get a lot out of this. Like Alison said, love your questions along the way. Include them in the chat box and we'll do our best to address them.

Steve Romano: You know, introducing the idea of mindfulness in and of itself can often be either exciting or a challenge, and it really depends on the individual and where they are. I really try to spend a lot of time upfront before we even get started with a coaching engagement understanding what their experience has been in the past, what they're really hoping to get out of a coaching process, if you will, and really honing in on what their goals are. All of that really helps give me information to really figure out the degree to which I'm going to introduce different tools that can really help them out.

Steve Romano: One of the tools that I like to share is a brief meditation with clients at the beginning of a meeting or a session. I find that it's incredibly powerful, because one, it takes literally two to three minutes, and two, it helps them recenter from what they were already doing to actually becoming more aware of their own emotions and thoughts before we go into any discussions in terms of the coaching process.

Alison Whitmire: Great, great. Once you've decided you're going to sit down and you're going to open a coaching session with some kind of mindfulness, what do you say? How do you tee it up?

Steve Romano: Yeah. I think it's really important to distinguish that each individual is in a different place. Some people actually have background in mind-body practices, whether it's yoga or mindfulness or tai chi or whatever it is, and some people really have a deep background more in what I would call a contemplative

practice, meaning one that could be a little bit more informal like going for a walk or experiencing nature or you enjoy art, or even reading could be very contemplative. So taking people where they are I think is key.

Steve Romano: For individuals that are open to a more mindfulness type of experience, I actually like to introduce the body scan. I don't mean that in terms of a 20 minute we're going to spend all of our time on this. Actually, for those of you who aren't familiar with a body scan, it's a very quick opportunity to actually recognize-

Alison Whitmire: We're going to do it. We're going to do it, so there you can-

Steve Romano: Yeah, we're going to do it, so why don't we dive in? Why don't we just do it.

Alison Whitmire: Okay, yeah. One thing. Let's assume, though, I'll tell you none of my clients have a contemplative practice. Let's assume we have a client that doesn't really have a contemplative, hard to say for me, practice and you've introduced it. What are the actual words that you would say.

Steve Romano: Yeah. I think a big part of what we're trying to do is actually help people become more aware, because more self-observant in terms of their own thoughts and behaviors and emotions. One of the things that I like to say is that to help us get grounded and to help you get focused, here's a tool that can really help you out.

Alison Whitmire: Okay.

Steve Romano: It's something that you can apply immediately to themselves in terms of what it is that's important to them, so it really re-centers and refocuses the what we're trying to accomplish with a new way of experiencing how you're actually accomplishing it.

Alison Whitmire: Okay, you want to take it-

Steve Romano: Actually, should we dive into a quick activity?

Alison Whitmire: Yeah, let's do it.

Steve Romano: All right. I know we've got people who are at home. We've got people in the office. We have people at all different hours of the day on this call. I find that the body scan is really helpful for this, so regardless of where you're at in your location I'm going to take you through literally a two to three minute activity, exercise here that's going to help you out, and one that you can use with people that you work with in the office or if you're a coach you can use I with others.

Steve Romano: What I'd like you to do if you're able to actually, if you're in a space where you're able to close your eyes for just a minute and you feel comfortable with

that, go ahead and do that. Make sure your feet are on the floor, that they're planted on the floor, that you can feel that, and just make sure that you're in a comfortable state, meaning that you don't have anything in your hands, that you just are able to put your hands at your side or somewhere comfortable on your body, on your lap, that sort of thing.

Steve Romano: With that, just take a couple breaths, two or three. Now, keeping your eyes closed if you're able, just bring attention to your feet and notice what you feel about your feet. Do they feel warm or cool? Do they feel planted? Just notice your feet. Now bring your attention up your legs a little, your calf area to your knees. Do your knees feel heavy or light? Can you feel your knees? Go ahead and bring it up a little bit higher to your thighs. Just notice what you might feel there.

Steve Romano: As you bring your attention up a little bit more to your torso area and right into your abdomen and your stomach, what do you feel there? Can you feel your breath? Then bringing your attention a little bit higher into your chest area. You feel the air and breath coming from there? How does that feel? Then bring it up a little bit higher to your shoulders, place where there's often a bit of tension, especially for those of us that are at a computer. Then bringing your attention to your arms, to your biceps, to your forearms, and to your palm area and all the way to the tip of your fingers. Those feel warm or cool? Do they feel tight? Can you feel them at all?

Steve Romano: Then bring your attention right back up to your arms, your upper arms and your shoulders and all the way up around your ears and your face, which is where we often feel a lot of tension and strain. Then bringing that attention to your eyes in particular, what do you feel there? All the way up to the crown of your head, just allowing your tension to focus on the top of your head. As you do that, you can just bring your attention all the way from the top of your head down through your body to your chest, your torso, through the legs and back to your toes.

Steve Romano: Alison, that's the opportunity just, I think we just took like three minutes there. How do you feel, let me ask you, Alison, just doing that for a moment?

Alison Whitmire: I definitely feel more grounded, more relaxed, more present. I'm more in my body.

Steve Romano: Yes, yeah. I think that's one of the great opportunities of doing this early on when coaching others, because it allows you to reset yourself very quickly. It puts yourself in your body, and I think there isn't much that's more powerful than being able to ground yourself in the body. I think I like this body scan in particular because it grounds you in the body, and I think sometimes people have a little bit of a challenge, especially early on, with only focusing on being in the moment sort of more breathing practice, right? You know that your mind is going everywhere. It happens to all of us.

Steve Romano: So using a very simple two to three minute way of grounding yourself in the body really gets yourself centered and it gives you a little bit of a space, and I think that's a lot of what we're trying to create on a very practical basis throughout the day, because we know that decision makings occur so rapidly throughout the day in our world. They're happening all the time. We literally make hundreds of decisions a day when you think about the small ones and how they add up.

Steve Romano: So being able to use a tool like this in the moment, because you can transport this tool anywhere during the day. If you're in a meeting, you can pay attention to your feet or do they feel grounded on the floor. Can you feel that? And when you're often, you could be nervous about something or you aren't sure about the idea you're presenting, or it could be some disagreement about things in a conversation. So even doing the very simple step of making sure your feet are actually on the ground, it's kind of like the metaphor like a trunk of a tree. It keeps yourself grounded and rooted in yourself so that you can be aware and observe not only yourself but others around you.

Alison Whitmire: Yeah. Thank you. So the questions we got in advance I felt echoed a lot of frankly some things I've thought myself about. I know mindfulness is important. I have a mindfulness practice myself. I'm going through a two year mindfulness meditation teacher training program. I get it. My clients never show up asking for mindfulness. They just don't. The topic doesn't come up. I'm curious, how do you, when you're first meeting with somebody, obviously it's getting the discovery, but how do you begin to introduce and even maybe use as a selling tool if you tool, differentiating tool, induce mindfulness into the work you're going to be doing with a prospective client?

Steve Romano: Right. Sometimes I don't even use the word mindfulness, because frankly it could be a little bit of a loaded question for people because there's so much information and disinformation in terms of what it is and isn't. You know, I really try to take them where they're at, and what that means is that everybody takes time to some degree on reflecting, on being a reflector, thinking about it.

Steve Romano: That could be as simple as before you go into a meeting or you're meeting with a team, you're preparing. It's as simple as this planning process of getting your thoughts together, of creating an agenda, of thinking about others in terms of what needs to be done. All of that is an awareness process. It's not self-driven, per se. It's about actually recognizing that there are components of this that you already do.

Steve Romano: While it may not be what we just did because it was a formal body scan for a couple minutes, but the ability to take a step back, to see the bigger picture of what's going on and to develop and think about this awareness is a very practical way of getting people in an indirect way in tune or in touch or recognizing that we all actually practice reflective practices to different degrees. Does that make sense?

Alison Whitmire: Yeah. I know I'm being kind of tactical here and the questions we got were pretty tactical, so you would say something like, "Hey, as we work together, one of the things we're going to focus on are your opportunities to reflect and aware. You're probably doing some awareness reflection practices today. We're going to focus on those and maybe expand them in a variety of ways."

Steve Romano: Yeah.

Alison Whitmire: What's your talk off?

Steve Romano: Yeah. Can I give you a quick example?

Alison Whitmire: Yeah, if it's something you specifically say to a client, absolutely.

Steve Romano: One of the things I say is that when do you find yourself when you're reacting to things, when you catch yourself in sort of a reactive loop throughout the day? What are you doing when you're reacting as opposed to being a more thoughtful in your approach? A couple examples are, and a couple of clients I've recently worked on this with, is that they find themselves just running from one event to the next without any sort of break, without any sort of pause. The simple things like, well, take a drink of water in between running from one event to the next to refuel a little bit, to create that few moments of space. Pay attention to how you're walking down the hallway from one office to the next or one meeting to the next. All of those, those are very practical, simple, concrete ways that bring awareness to what's actually happening inside of you.

Alison Whitmire: I get it. I'm sometimes slow to catch on. It sounds like you don't really talk directly about mindfulness at all or reflection at all or awareness at all. You simply begin focusing on doing the work, focusing on some of the things, trying out. I guess you'd show up and just say, "Hey, can we just try something new today? Can we try a body scan and see, Steve, what you're experiencing?"

Steve Romano: Yeah, if they're-

Alison Whitmire: [crosstalk 00:19:59] because you might use it.

Steve Romano: Exactly. If their experience level is very minimal, or they may be a little resistant to even talking about using those words like mindfulness or mind-body or anything like that, is actually just starting to introduce some of these basic practices, and all around observing yourself better, greater awareness, and then the relationship between yourself and others starts to open up a whole new conversation.

Alison Whitmire: Yeah, what I'm really appreciating now is you're instead of saying I'm going to introduce this other thing and it's called mindfulness, blah blah blah, what I'm hearing you say is you lean into the practices they already have today of either reflection or awareness or contemplation and the benefits of those, and the

places in which they don't employ those and if they did might yield a better result, and how you can help them emphasize and expand those moments of awareness, contemplation, reflection.

Steve Romano: Exactly. I also stay in tune with and ask about what are they already doing in their lives that's working well, that helps ground them. Everyone has a little bit of a different experience with that, so just trying to build on that and understanding that. Some people like to go for a walk. They'll take a quick break for lunch, as an example. So maybe what I would say is something like, "So, have you actually ever had lunch and not had the computer or your phone with you? Have you actually walked around the grounds of where you work? Have you paid attention to actually the signs and the culture and what does it look like here actually where you work? Have you noticed the other people's pace in terms of their walking?" This all gives you great information about the culture and, by the way, how much time did that take? It was instant, right? It's an automatic return.

Steve Romano: The goal here is actually by increasing this awareness, you're becoming a better observer. You're getting new information, and this new information starts to inform how you can make better decisions. By the way, this is a key point, because part of introducing or talking about this whether it's direct or indirect is actually recognizing that the ability to observe yourself, to be mindful and especially in a coaching context, is that you're helping people to recognize habits that they have in place, and how those habits could be potentially either contributing to your effectiveness or not, to your choices. Are your choices based on fear or are they based on making a courageous decision or a courageous thought?

Steve Romano: So helping them actually see that these tools and the ability to be present, centered, and mindful is going to help them be better decision-makers, to help them relate to other people more powerfully, and to be able to get different outcomes because they're seeing things in a new way.

Alison Whitmire: Yeah, thank you for that. That really was a helpful understanding to help me integrate. Not bringing something outside in, like a foreign in, but breathing in mindfulness into what they're already doing regardless of what they call it. Because we got questions like, "How do you take the religiousness out of mindfulness." Sometimes you don't introduce it is, you don't bring that thing out that has that taint around it. You just expand what they're already, expand, emphasize, focus on what they're already doing and widen it. Love that.

Steve Romano: I think so too, and frankly if they do have a spiritual practice and they find value in that and it happens to come up in a conversation, and it brings me in their life, please bring that, in the sense of practice that, that's your personal practice. You're right, that is a common misunderstanding in terms of what being mindful is about, because to me it's all about bringing attention to what's happening in the moment.

- Alison Whitmire: Mm-hmm (affirmative). One that, sorry, Kaninsley, sorry Wanda, asked, "How does Steve assess the client's level of consciousness or comfort with mindfulness?"
- Steve Romano: That's an excellent question. One of them is just asking upfront in terms of what do you do to renew yourself, where do you get energy from. Everyone has kind of this balance between activity and rest, and so I think one of the ways frankly is asking them. Another way I know working with coaching clients is I have that on an intake process, if you will, and I'll ask that question. I'll say, "Have you had experience in terms of any practices?" Whether it's yoga, again, or being mindful or what have you.
- Steve Romano: The other thing is that assessing it that way is great. Sometimes I'll use tools, whether it's an emotional intelligence-type tool. I do have my own mindfulness-based assessments that I have myself. One of them is on listening, and to me listening is a huge gateway in terms of helping you to get in tune with others, and also recognizing your own tendencies and thoughts. So some simple assessments could also be very helpful as well.
- Alison Whitmire: Great. I'm going to take one question that was sent in in advance, then I'm going to go to Kris to see what's going on in the chat. Greg Scott asks the question, "What approaches have you found successful for overcoming dismissive responses to these kinds of activities for the leaders you coach?"
- Steve Romano: Yeah, so I think that's where I keep going back to take people where they are, and I think context has a lot to do with it. I think one of the worst things that you can do or I should say for myself is that introducing ideas around this too much or too quickly could actually be a self-sabotaging experience and none of us want that. It's uncomfortable and actually, more important, it's ineffective.
- Steve Romano: Look, if people aren't open to this and there's an openness or opportunity to ask that question as to why, I would encourage somebody to do that to really understand that, because that could really open up a conversation, and it also helps you move toward what you would rather not, which to me is all about courage, right?
- Alison Whitmire: Yes, it is, and there's something to learn in the resistance.
- Steve Romano: There is. There's something to learn in the resistance, and that's about understanding what that resistance is. The other thing is that if it's not full throttle in terms of introducing and practicing mindfulness, I do think again, going back to what are ways that you can create a more reflective and more thoughtful and less reactive culture are great ways that you are actually introducing ways to practice being mindful. Mindfulness isn't only about a formal practice, at least in my mind, of sitting down and breathing. That's great, and don't get me wrong, it's super helpful. It leads to clarity and productivity, and I think all that's great.

Steve Romano: How can you actually help people to take a step back, to look at things more broadly, to ask people specifically how is what you're doing connects to the mission of the organization. How is what you're doing connects with the goals that your team members are focusing on, for example. Those are all ways of expanding how you're thinking about what's going on, so those are thoughtful, reflective practices that one can say is along a continuum here.

Alison Whitmire: Well, let's go to Kris and see what's going on in the chat box that we should respond to. Kris?

Kris Harty: Yeah, hi guys. We have one comment and possibly one question we're getting some more clarification on. Lisa Golden shared that at Sharp Chula Vista, I think it is, they're proposing starting meetings with a one minute mindfulness exercise. I thought that was really interesting and what a great idea.

Alison Whitmire: Yeah, I start my CEO group meetings with a one minute of silence. We begin the CEO round tables with a minute of silence, and we end it with a minute of silence, and it's really common for us all to say it was the best minute of the day.

Steve Romano: Yeah, and I love that idea, Lisa. It's a great comment. I think for organizations that are open to that it would already suggest that there's some level of not only awareness but actually advocacy in terms of creating a culture. A lot of our discussion so far has been in fact about the individual. I think what Lisa's bringing up, which I love is actually rewiring the culture to an extent, in other words creating environments and situations through meetings where you're actually as a group practicing this. I think that could really raise the entire consciousness level of an organization. I love it.

Alison Whitmire: Anything else, Kris?

Kris Harty: Sherry Campbell has asked a bit of a question. She just asks to please speak more on the context you have noticed that people have around us. I think I'm trying to get a little bit more clarity around that, but do you have any thoughts around that, Steve?

Steve Romano: Yeah. Context, great question. I'm not really exactly sure perhaps what that means. You mean in terms of introducing it for the first time or yeah, any more sense on that?

Alison Whitmire: How about we, Kris, see if you could get a little bit more clarification on the question and we'll come back.

Kris Harty: Yeah, that sounds good, and I actually have a little bit more at this point, it sounds like. She says, "Steve mentioned paying attention to the context when one is dismissive. I was curious what he noticed in terms of common context." There we go.

Steve Romano: Ah, yeah. So I think it's, if I'm understanding that right, it has to do with the context when it's about being dismissive. Perhaps that's it. I mean, the experience I've had, and I've had this personally when I've worked internally and also have introduced programs like this, is that I find that there's a lot of misinformation or misunderstanding about what actually could be the benefits of introducing the ideas around this. If you have a decision-maker that's the one who's the resister or not understanding this, it's really important to pay attention to that and ask those questions.

Steve Romano: Also, considering start small. Starting small could be talking about or finding other people who have similar interests or similar desires to bring this thought and this practice into a work-type situation. The example that Lisa gave, that one minute experience, whether it's focusing on breath or actually just being quiet for a minute, could again be a wonderful way to help introduce the ideas and create some context for actually how this could work well.

Alison Whitmire: Thank you, Kris. We're going to keep moving on. Appreciate it. Yeah, I heard an interview of Jon Kabat-Zinn, and he tells the story of he was going to speak at some large company, and he walked onstage and he said, "You know, let's just take a few moments and be, just be without an agenda here for a few minutes." He was just quiet for a minute, two, how long, and when they came back he said there were just tears running down the faces of many of the people in the audience. He noticed that and he said, "What's that about for you?" And someone said, "Just the idea of a few minutes without an agenda."

Steve Romano: Yes, yeah. In some ways it's crazy to think that we're actually talking about this, but that is the reality. I like to say that listening is about being present. It's not necessarily about being quiet. I think in that example that you shared, there was a degree that people were actually present to themselves, even for a minute or two, because again, you're creating that momentary pause during the day to get yourself refocused and re-centered. I mean, it could be as simple as taking a drink of water in between meetings or during a meeting, making sure your feet are grounded on the floor, recognizing the stress that could be in your shoulders while you're on the computer. All of those things create pauses or little breaks during the day which can help to recenter. That's something that again you can help others with too in a coaching capacity, is helping them to recognize what are some of their triggers and how are those triggers manifesting in their thoughts, their emotions, and their body.

Alison Whitmire: Yeah, for sure. We've got a number of questions and I'll go to those in a moment, but I wanted to ask you, Steve, how you introduced this BEING model with your clients.

Steve Romano: Yes. Yeah, so the BEING mode, the Leading as a Way of BEING model, is a way to really help leaders and individuals work through uncertain and stressful situations through a mindful-based, present-centered approach. The BEING model is actually an outgrowth from several years ago with my dissertation. It is

a tool that I use with both teams and clients now on a regular basis. It's not necessarily something that I always introduce directly in and of itself. Again, taking the person where they are.

Steve Romano: The five elements in brief are about awareness around your breath, and we did that through the body scan at the beginning. That's an example of it. Recognizing when you're short of breath or when it's shallow of breath, so there's an awareness component there.

Steve Romano: The energy is all about recognizing how your energy is flowing during the day. This could be about emotions, it could be about feeling anxious or excited or frustrated or anything that's contributing to your emotions, because if you're able to channel your emotions and use your energy in specific ways, you're going to be able to become more energetic. I don't mean it just in an emotional way but in a way where you could direct your attention in ways that are going to contribute to the energy and focus that you provide. Recognizing that we all have different flows during the day and how you can focus your energy is really powerful.

Steve Romano: The I is about investigate. We're all driven, whether we're consciously aware of it or not. We're all drive by our own values and beliefs. It's often what's below the surface, and below the surface doesn't always show up in what your thoughts are but they do lead to your choices and your behaviors. So just recognizing and using tools and reflection to really get in tune with what drives you, what are your values. Is it about being creative? Is it about being an achiever? Is it about being an adapter or an innovator? Is it being an expert? Everyone has values that are driving our behavior, and those behaviors become habits, and if we're not aware and consciously managing our habits we run the risk of doing things that aren't always productive. So the I is about recognizing those values.

Steve Romano: The N is navigating change and uncertainty. In our environment today where decisions are literally happening in a matter of seconds, where the goals can change very rapidly, and where you just have a lot of noise and information that's happening, you've got to be able to harness ways of being resilient to work through those things, and being resilient can take many different forms, but just focusing on being resilient and adaptable is a way to navigate these changes.

Steve Romano: The last one, which I can't underestimate or over-emphasize enough, is what I call generate, and that's about being able to listen in new ways. When I say new ways, I mean not only listening to what somebody's saying in terms of their content or the words that they're saying, but actually listening and recognizing your own self-chatter that often goes off in our head while we're interacting with others, being able to have a conversation with somebody without judgment for that moment. At some point you need to make a judgment, but for that moment you're withholding that, and you're also instead of leading with

an answer or waiting to respond with an answer, which is very common, we all do it, with listening, that we're actually helping to build on the ideas of others.

Steve Romano: These five dimensions, if you will, really create what I call this Leading as a Way of BEING or this entire blueprint for how we can lead with greater awareness and observational mindfulness really in our 21st century world of change, which we all experience every day all the time.

Alison Whitmire: Yeah, for sure. It sounds like you don't always introduce this as a concept, meeting your clients where they are. If you're not introducing this kind of model, this framework, with your clients, how are you working with it in the work you're doing?

Steve Romano: Yeah, so very simply the one around listening, generate. It's about how are you showing up when you coach and interact with your colleagues and team members. I will ask that question. Tell me about when you're listening to people, how are you doing that? How are you creating a space that you can actually engage with someone without an agenda, without a preconceived notion about what the answer is? I think for those of us who especially have technical expertise, it can be a challenge because we're so great at what we do and we just want to share that with others.

Steve Romano: So how do you start with almost like a beginner's mind? Beginner's mind is like if you were to hear this for the first time, how would that influence how you listen with someone else? That's an example of one element here of the BEING model on how you could actually do that without introducing, trying to give them a comprehensive version of how they could transform themselves. For me, it's actually really taking them not only where they are but introducing them with these ideas with relative to what's important to them for that situation.

Alison Whitmire: Mm-hmm (affirmative). Did you say you have some kind of listening assessment?

Steve Romano: I do. It's actually on my website. It's on the front page. You can download the listening assessment there, and you can take it and it actually will give you some tools and some ways to think about how you go about listening, because again, I'm not getting at only of what you're hearing, but actually you're listening in the context of yourself. You're recognizing when you're listening am I coming in from a state of do I feel tension in my shoulders, is my mind scattered, am I making self-judgments about what I'm thinking. Am I good enough to have this conversation? Am I qualified to share this information? Noticing that is a big part of the listening component, so that is on the website, if you will.

Steve Romano: The other thing is, if I could say this too, Alison, is that they have a white paper also that's called The New MBA, Mastering Being and Awareness, and that's also a free download for anyone who would like to use it.

Alison Whitmire: Cool, and we'll give all information about that before we're done here today so everyone can look at that. A few questions we've had come in. Other than mindfulness, what other tools or processes can you share that we can use at the beginning of a meeting.

Steve Romano: At the beginning of the meeting, one of them I think is writing down your thoughts about the agenda.

Alison Whitmire: Having your client write down the thoughts, you writing down the thoughts?

Steve Romano: Yeah, your client, people in the meeting themselves. You can start with a question that they reflect on with writing. I could be a provocative question or it could be a very practical nuts and bolts question. I love the idea of journaling. Some people love it, but some people don't, and let's face it, actually most people in terms of just journaling would be a stretch. But I think what everybody could get into is actually writing down a couple ideas about a burning topic or the topic of focus for that meeting.

Alison Whitmire: Yeah. Something I'm really appreciating about and doing more and more in my own work is instead of assuming clients are going to do something or write something down or prepare for the meeting or do their homework, I've just stopped assuming any of that, and the more that we can bring that into the actual coaching session. Spend a minute, two minutes writing down what you'd like to get from our [crosstalk 00:45:30].

Steve Romano: Yeah, exactly.

Alison Whitmire: Instead of... I was in a coaching session just yesterday and my client was talking about, "Yeah, I really got to write down the job description I want and this next version of the organization." Like let's do that now. Let's not wait. Particularly because this is a client that session after session that doesn't happen. So I think, yeah, bringing more of this work right into the session, I love that.

Steve Romano: Yeah, and I think that's key, and I think that part of that is you're getting people to shift from this idea that doing a 10 minute or 20 minute breathing exercise is what it's all about, and I actually see that it's actually in the moment all the time every day. It becomes just like a habit. You don't think about it in time. When you do this throughout the day, then it becomes a habit that you want to reinforce.

Steve Romano: Here's another quick example. Interrupting other people, recognizing that tendency to do that is often a reflection of a reactive approach to things. A responsive approach is being able to ground yourself, focusing on your breath, making sure your feet are planted, yes, but also just focusing purely on what the other person is saying and letting the self-chatter just give it a little rest for this conversation. That's something that all of us can do and practice today probably many times.

Alison Whitmire: The clients you work with, this is Patrick Brody, the clients that you work with who do have a mindfulness practice and they do that, how do you integrate that since you're meeting them where they are and they're there already? How do you then utilize that in your work with them?

Steve Romano: Yeah, so when they do that I'll ask them about it in a coaching conversation. I'll ask them where do you want to start, and oftentimes I'll hear, "Well, I either have done this in the past or I actually really want to do this." I hear this a lot. I really want to do more of this. And I'll ask them, "What does that mean for you. How would you like to do that?" I'll start introducing more ideas as time goes by and keep building on that, but I also say, "Hey, if you're open to doing three minutes a day and you can do that consistently, let's start there." I'll ask them when we meet and I'll send them an email. I'll pick up the phone and I'll say, "Hey, Jane, Hey, Mark, how's it going with this? I'm just curious. I'd love to hear how this has been supporting you and what's been a challenge about doing it."

Steve Romano: I have folks that say, "I work in a crazy environment. I can't even do that here." I'll say, "So how about you sit in the car for five minutes before walking in from the parking lot into the building to do that?" I can't, you would be surprised at how many people would say, "Never thought about that, that's actually a great idea." Because most of us are running from either taking care of our kids in the morning to dashing, having a quick breakfast to getting out the door, is that how are you creating these moments of actually resetting how you experience your day. By bringing some attention to that, I'll bring that into the conversation, ask people directly how is that going and that leads to new conversations and also new practices.

Alison Whitmire: Yeah, I'm really appreciating this idea that you're saying is let's integrate it into their life into something they're doing already, not add another thing.

Steve Romano: That's right, that's exactly right. Also, I love that because I can't emphasize that enough, and that is this isn't about adding more things, this is actually about doing things differently that you're already doing by bringing greater observation and awareness to your tendencies and habits that you already have in place.

Alison Whitmire: Yeah, okay. I want to make sure we get into your six point model here, your six point transformational coaching model. I'd love to hear just a brief five minute, we've got about five minutes left before we kind of begin to ease into close, how do you introduce it, how does it work, and maybe if you can share us a brief story around here's a success story of a client around [crosstalk 00:50:40] that would be great.

Steve Romano: Right. So that's great, so thank you. I use this as a guidepost, and it's not a linear path, if you will, although you can use it as that. In particular, I was coaching a physician leader. She worked in this prestigious hospital. She had the responsibilities of managing other physicians as well as herself, obviously in

terms of having a patient load. The connection is all about recognizing what drives her. I use an intake form, I have a conversation, I find out what her motivations are, what her goals are. I talk to her supervisor. I figure out what assessment tools might be of value to her. I'm building rapport, I'm building trust, I'm creating a safe space by doing things that we're talking about like listening and really just in a nonjudgmental, present-centered way but also offering up some path forward of how this can work.

Steve Romano: Connection is all about that. It's about building a rapport and a relationship and that trust building as early and as quickly as possible. To me that's not coming into the relationship as I have all the tools or all the answers. I have tools that can help you. Some of these you might find the value, some that you don't. So the connection is one. The assessment piece is another.

Steve Romano: Depending on what their needs are, I'll adjust to that. For example, going back to the individual who's a physician and who also happens to be a leader, she was experiencing some signs around burnout and wanted to increase her own resiliency level and her own effectiveness level in terms of how she leads and manages others. The assessment part, we ended up doing a burnout survey. We did one about resilience and we did one on emotional intelligence. These set the baseline. They're an outgrowth of the connection.

Steve Romano: They lead to the assessment, and then that leads to the articulation. You've got all this great information. You've got this focus. You've been exploring it. How can we actually create some focus on this? Where your attention go, where your attention is, there your energy goes. The articulation is about creating a goal and a plan that's supportive, but also in a way that not only is a written plan but is one where the janitor is involved.

Steve Romano: Also, I like to spend a lot of time asking the question, "What's your hypothesis if you were to achieve this?" What's your assumptions? This gets to the beliefs and the values which goes back to the BEING model about investigating. So I use this tool as a way to help them cover that.

Steve Romano: The act is all about you've got the direction now. Now it's really time to work the plan and get things going. This is where you start to, you have focus and you're able to make things. You're ready to go, you're moving and you're doing things, and it becomes more about experimenting, taking some risk, working on some new areas of courage so that you can reduce your fear-driven choices, not get rid of them. I like to say that, but-

Alison Whitmire: We just have one more minute, Steve. Sorry to interrupt.

Steve Romano: No, that's great. The last two really are making those adjustments, moving it along. You're accelerating, you're celebrating those wins, and you're recognizing your accomplishments and hopefully you're going deeper. You're going deeper

and you're doing that in a way that is accelerating and sustains that. That's essentially it in brief.

Alison Whitmire: Great. Do you want to finish the story of your client real quick?

Steve Romano: Yes. One of the things that she was really struggling with was some basic self-care, taking drinks of water throughout the day, refueling with good, healthy food, unwilling to talk to some of her team members that she was hesitant about, so she was trying to overcome some of her fears or develop her courage that way. Articulate her vision and communicating that vision with others. Those were all success stories which at the beginning of her process she was in a complete reactive loop where she was running away from everything and was actually trying to figure out if she wanted even to be a physician anymore.

Alison Whitmire: Wow, that's a huge shift. So what did she decide in the end?

Steve Romano: She actually, in this case she decided that she loves the patients and that was where her energy is, and she wanted to make sure that she continued that path. The other thing is that I worked with the manager during this process too so I'm always looking at the system and the culture, not only individuals, and what we ended up doing was her and her boss came to the decision of having a co-directorship for the role, which was an innovative model in terms of how they actually do business and help cancer patients. They created a shared approach to leadership, as opposed to her being the only one. That's pretty cool.

Alison Whitmire: That's super cool. Great outcome. Okay, so sorry we didn't get to all the questions, but we want to make sure you've got the resources that you need to go from here. Kris, if you wouldn't mind launching the poll on how we did today for feedback, we'll do that.

Alison Whitmire: Then training. If you want to know more about Learning in Action, you can find out about what this thing is we're now talking about, relational intelligence. That's on June 21st. Free 90 minutes. We're starting to look for classes that are going to benefit coaches that you wouldn't find anywhere else.

Alison Whitmire: We created this new class called Psychology for Coaches. Our experience is a lot of times when we talk about a little about psychology, which after all is the science of the mind, some coaches get uncomfortable. We want to ease that and demystify some of that and look at how we can take some psychology concepts and actually apply them in appropriate coaching contexts. That's May 31st.

Alison Whitmire: If you want to learn more about our EQ certifications, you can see that. Everything's at Learning in Action at teachable.com.

Alison Whitmire: Now, about Steve. Steve has... Is it a one dayer, Steve, in San Diego on May 21st?

- Steve Romano: That's correct.
- Alison Whitmire: Okay. So Steve has a one day program coming up, Teams and the IT Factor, or the IT Factor.
- Steve Romano: That's right.
- Alison Whitmire: You'll learn how to influence and operate within a team-based environment. You'll have these three diagnostic tools to identify how a team is performing, a tool kit of resources that aligns with a high-performing team, and three strategies to build on what Google says is so important to a team, psychological safety. That's what Steve's got going on.
- Alison Whitmire: If you'd like to connect with Steve, you can see all the information how to do that here. His email address, his website is here, his white paper you'll see at the website, the listening assessment is there.
- Alison Whitmire: If you want to keep in contact with me, please do. We'd love that. You've got my Twitter handle and you've got my email here, websites. Our courses are there.
- Alison Whitmire: I'm super excited for our next guest. It's Chris McGoff. Awesome, brilliant man, the leader and founder of 120 person OD firm here in the D.C. area. We're going to talk with him about sparking a peak performance culture. That's going to happen on May 22. Super stoked about that.
- Alison Whitmire: Steve, thank you so much.
- Steve Romano: Thank you. This has been great. I hope everybody out there has got something out of this.
- Alison Whitmire: Yeah, me too. Thank you so much. Thank you everybody for joining us. Until next time. Have a great weekend. Bye now.