Fulfillment!

Beyond Engagement: Building Winning Workplace Experiences

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To all those who help others find fulfillment in their lives.
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Preface

Why is the concept of fulfillment important to your organization? Simply for the same reason that it is important to you as an employee. When you are fulfilled or on a clear path to fulfillment in life, you are focused, motivated, engaged, and growing as an individual. These are also critical traits for someone in your organization, especially when they are aligned with your mission, goals, and culture.

When employees are not becoming fulfilled, they are often unfocused, less motivated, and stuck in their roles and lives. Over time, and it may be a short time, they decay. That is, their talent—motivation, skills, and channeled energy—declines, leading to lower engagement, get-by performance levels, and stagnant skills. You have most likely seen this profile in your organization or even in your friends and family.

Take Allen, an executive with a health care company in the Eastern US, who has been drifting for years since he hit fifty. He no longer has the motivation to shine like he once did. He has defaulted to performance on autopilot. The job he has no longer brings out his innovation, excitement, or learning desires. He is hoping to coast until early retirement or until a good package is offered. If you think this is sad for Allen, how do you think it feels for those who work for him?

Or take Marcia, a mom returning to the workforce who is deeply concerned about what has passed her by during her absence. In her first year back, she notices that she is not tapped for any interesting projects and she is often skipped when she has volunteered for a task group. Others sometimes volunteer excuses for her without her saying them, such as “I guess you have to get home to the baby.” After nearly twelve months, she is losing her motivation and her stress is growing due to a lack of relevance or opportunity at work. Also, work/non-work balance is difficult, and the company is no longer investing in new training for her. She gradually withdraws from her once highly motivated, high-performance former self.

Or Kayla, a software specialist who has been with the organization for a little less than three years, after graduating with honors. At first, she was working
24/7, rated a top performer, and absorbing every learning moment she could. But in the last year, she has begun to drift, not sure where this job could lead, and not feeling challenged in the same way as she did earlier. She is seeing other peers backing off because there are no real rewards for working harder. She has begun to answer calls from recruiters and increasingly talks to friends in other companies. Her boss has been wondering why Kayla is not at the same performance level as before.

Each of these cases and many more are examples of people who once had the highest engagement scores, were highly aligned with their organizations and teams, and learned at the pace of a race car. But things intervened, and in the above examples, they were not driven by the employees. Because something was missing in the organization—perhaps a clear path, learning opportunities, or an engaging manager—or work had become routine and uninteresting, the employees slipped into low-engagement mode. All of these employees could have been revived by the organization if they were identified and treated at the right moment.

Human resources professionals are in a prime position to address these issues. The above examples involve recognition and rewards, career paths, leadership skills, cultural biases, diversity and inclusion, and job design. In essence, this book is about creating meaningful employee experiences that continue to align, engage, and enable people to grow.

While nearly everyone we studied in our research expressed desires to be fulfilled in life, only about one-fifth of the people scored high on fulfillment. A strong majority of them were far from it. Many people who you see daily may be successful in their careers, but in the privacy of an interview admit to not being fulfilled either at work or in other aspects of their lives. Some excel in one area and struggle in others. Connie told us how her family and friends are incredible sources of fulfillment in her life, while her boss tears her down at work. Others find work exhilarating but have problems balancing other segments of their lives.

Success is not equal to fulfillment, as many of those I interviewed later in their careers testified. Fulfillment requires whole-life fulfillment, not solely in one sector of life—unless that sector is the sole purpose and goal of that person.
Why Is This Important to Organizations?

There are six important reasons why fulfillment is crucial to your organization now:

1. The talent pipeline is increasingly a growth choke point for many companies. Managing the talent pipeline was listed as one of seven critical HR themes in *The Rise of HR.* The first challenge is finding talented people who would want to join your organization. While new talent search technology is identifying candidates faster, smart HR organizations have realized that the second challenge is finding talent that will stay and delight customers or internal stakeholders with high performance. This requires finding talent with fit—skills, attitude, aligned values, and engagement in your culture. Having an attractive employer brand and employee value proposition (EVP) are essential today, but they must be connected to the new hires’ experience and fulfillment when they show up.

2. Another talent pipeline gap is leadership bench strength. Many millennials and others are choosing not to become managers because they do not see it creating fulfillment or balance in their lives.

3. Another critical issue identified in *The Rise of HR* is optimizing the talent you have invested in—that is, are you getting the best bang for your buck from the talent you acquired? Are your employees yielding high productivity, delighted customers or stakeholders, high quality, and extra effort? People who are finding fulfillment in their work are riveted on those objectives.

4. More and more management boards are focused on people risks—issues that could derail or slow down long-term growth or the ability to hit key targets. Obviously, one is the turnover of key talent. Another is skill erosion—employees who are no longer up to today’s standards.

5. An increasing risk in organizations today is stress and burnout, leading to many costly physical and psychological outcomes. The results range from sick days for minor setbacks (headaches, fatigue, and colds) to more debilitating ones (threats at work, stomach ulcers, heart disease, autoimmune diseases, and suicide), all of which have been going up. Even if an organization’s leaders didn’t care about the personal aspects
or the brand impact, they would still need to deal with the rising insurance costs associated with these outcomes.

6. Lastly, engagement is an overarching theme throughout The Rise of HR and many other trend studies in HR. According to David Shadovitz, publisher of Human Resource Executive, employee engagement has been the number one issue for senior executives for several years running. And yet, engagement scores across companies on average have not gone up much in the past twenty years. From my interviews with senior executives, one of their biggest frustrations is investing in engagement surveys, talking about engagement, drumming it into their line leaders, and still not seeing major across-the-board improvements in engagement. As you will see in this book, focusing on engagement in isolation does not work. Without high fulfillment, engagement simply will not increase in the long term.

Fulfillment plays a major role in helping to reduce risk, retain employees longer, and ensure that they are not becoming obsolete. And we know from our interviews that fulfillment is restricted for a variety of reasons: fear of obsolescence, conflict at work, no growth, abusive or unhelpful bosses, lack of recognition, overload, stress and burnout, and lack of clear priorities.

Throughout the book, I will address what individuals can do to personally control their fulfillment. However, we know that organizations can do much to boost and sustain employees’ fulfillment. Organizations that succeed in this endeavor develop highly fulfilled people and winning cultures that create a unique, competitive advantage.

**HR Takes Center Stage**

Here’s where HR comes in. HR, which is typically responsible for designing people or talent processes in the organization, is in a wonderful position to influence senior leaders’ behaviors and policies, guide the development of leadership competencies, and train middle- and first-line managers who often are fulfillment gatekeepers. For example, onboarding is essential, but if it does not accelerate the acculturation of new hires, it diminishes fulfillment through hazy expectations or potentially misaligned goals. These and other elements of the talent lifecycle either enhance or reduce fulfillment for
individuals, depending on how the elements are designed and executed.

HR also influences the employer brand and talent value proposition (TVP). (We prefer TVP over EVP because it encompasses all talent—not just employees.) Indirectly, if the TVP is fulfillment-unfriendly, people may join the organization for a job when needed but will be unlikely to stay when they can make a switch. But in many organizations, the recruiting hype and TVP are aspirational, not representative of what the individuals are going to find when they step across the corporate threshold. When the company’s values and goals are not in sync with the individuals, it is only a matter of time before the individuals leave, or mentally leave while still physically present.

As you will likely conclude after reading this book, there are practical, imaginative ways that HR can address fulfillment and move beyond the tired approaches to engagement that often have had marginal success.

Now is the time. The world of work is changing—and if HR wants to lead, they need to get ahead of the curve and begin taking actions to create employee experiences that will lead to fulfillment.

**About Our Research**

This book offers a way of thinking about life’s opportunities and challenges that is different in important ways from other sources. The insights and methods proposed here are immediately actionable by any reader, at any stage of life. The knowledge behind this book has a strong foundation in field research and professional practice. It is not the research and practice of an academic psychologist or a practicing therapist. Rather, it is that of an organizational psychologist and HR professional who has spent over thirty years as a researcher and management consultant in all organizational walks of life—startups, not-for-profits, Fortune 500 companies, government organizations, and even church groups. As the founder and principal of Metrus Group, Inc., my colleagues and I have studied hundreds of companies and interviewed and surveyed tens of thousands of people, ranging from C-suite executives to customer service reps, union shop floor employees, and service delivery personnel. We have studied installers, sales reps, clerks, scientists, engineers, HR managers, accountants, systems designers,
production employees, retail staff, lawyers, and mill workers.

We have published our findings in a series of books readily available to academics and lay audiences, as well. But this book is a summary of our findings intended not for my academic colleagues, but for practical application by readers like you.

Reflections on this body of work led us to the concept of fulfillment as a critical quality that is evident when individuals are conscientiously living in accordance with a plan that brings out the best in themselves. They feel fulfilled when they are living and working in alignment with their values and those of their friends, family, colleagues, and employers; utilizing skills and interests both on and off the job that represent their highest capabilities; and fully engaged in the significance and purpose of their work, family, and life overall.

But what inspired this book are those factors all of us can control, and those decisions all of us must make, which lead to either rich rewards or wasted opportunities, thriving or neglected friendships, fruitful or sterile marriages, and enriching or soul-deadening work. While clearly fulfillment is an important individual aspiration that drives work and non-work choices and behaviors, we also know that job/career is one of the top two areas of life that drive or diminish fulfillment. Organizations that can create employee experiences that are fulfilling have a distinct competitive advantage. In our final chapter, we will explore detailed ways in which HR and the organization can do this.

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Rise of HR was underwritten by HR Certification Institute and an e-book version is available free of charge on their website.
**Introduction: Learning from Those Who Have Created Rich and Rewarding Lives**

Marisa is a marathoner, mother of three, consummate devotee of theater and music, and a former client of mine. She could be someone you work with daily in your organization. She works hard. She joined her company because she wanted to make a difference in addition to making a living. She did the normal things that people do in companies—go to meetings, complete reports, and finish her assignments.

When I spent a little more time with her, I realized she had something special going on. She was tireless in her efforts to bring about change, digging in to help her employer transform its business. She generated new ideas, figured out ways to overcome historical blocks, coached leaders, and revved the team. Culturally, this organization was tired, but she brought it new energy. She rallied support for new thinking and processes that my firm introduced to her company, and by doing so, it was transformed into a powerhouse that began to dominate its industry. She is one of the most upbeat, optimistic people I have known. While being optimistic is nice, it was her tenacity to help the team reach goals that set her apart. When others said “we can’t,” she said, “why not?”

Not only was Marisa an inspiring leader in her company, she had a full life outside of work: running, helping her children grow, and participating in community and professional groups. She was contagiously vivacious to all she touched. She spoke at professional conferences, inspiring younger people to become all they could be.

Nothing was handed to her on a silver platter. The Marisa I met had recovered from a difficult, flawed first marriage, requiring her to raise two children with limited resources. When her marriage dissolved, she didn’t even know what type of work she could do. She was the quintessential bootstrapper, going to employers and saying, “I can do that.”

Despite no business education or experience, she landed a job as an HR trainee and followed that with a promotion to a project manager in training.
and development. When they needed someone in a new role, she once again raised her hand and said, “I can do that.” She had to work long hours to figure out what she had just committed herself to do. She also worked hard on finding and creating relationships with experts who knew far more than she knew, but who felt honored to be her mentor and teacher. When I met her, she had scaled the corporate walls to a position of vice president. If you had clicked back ten years, you would not have thought it possible. Chance? Not on your life! Perseverance, a great attitude, moxie, and perhaps a little bit of luck got her to where she was.

In addition to everything else, she was caring for a daughter who had serious medical challenges and dealing with other family traumas. But the real bombshell dropped in a quiet conversation at The Conference Board in New York.

After our session finished, she informed me that she had just been diagnosed with stage 4 pancreatic cancer. Doctors were giving her only six to nine months to live. I was devastated, almost unable to speak, tears welling up in my eyes. Remarkably, she maintained a radiant glow of hopefulness—more than I could possibly muster at that moment. She looked me in the eyes and said, “I will beat this!” While I knew Marisa well, I have to confess I had my doubts. After all, her hospital was known for its reputation in cancer diagnosis and treatment, and they didn’t give her much of a chance. I knew she was a miracle worker, but no one is indestructible.

And now, as iconic radio broadcaster Paul Harvey used to say, “the rest of the story.” I am delighted to report that the end of this story is a happy one for Marisa and for all of us whom she touched. Among the cohort of pancreatic cancer patients who were given this dreadful diagnosis, she was one of the scarce few to have survived for more than ten years—and still counting.

I recently sat down with Marisa and asked her how she did it. She shocked me with her answer. She said, “I applied what you taught us at work to my own life. I used the scorecarding and alignment approaches that you had taught my company.”

I’m sure I had a blank stare because this simply did not compute for me, so I
asked her to elaborate. What she went on to explain is that she quickly sat down and set clear goals for her life. Of course, the big audacious goal was to beat the cancer and go on living. But the first goal was to live—for one year. Then she listed all of the things she had to do—her drivers of life—to give herself a chance. She had to shed work for the time being and find an oncologist who believed she could do it—no small feat, as she described the tedious process of searching to find one. And most importantly, she had to get rid of all relationships in her life that were not on her “survival team.” She told one relative that she would not be able to see her again if she could not get on the “positive team.”

Marisa then set out to learn from survivors and establish measures for herself for many different drivers of survival: weight, energy, stomach pain, diet, spirit, exercise, and medical indicators. She sought out the best advice in each of these areas. She studied and found spiritual healers, sought alternative medical advice, discovered different dietary approaches, tried experimental medicine, and found workable exercise routines. Her “dream team” of advisors grew, and her indicators gave her hope as she worked her plan unrelentingly. She believed that energy and optimism were critical factors and managed to keep both high despite the debilitating effects of chemotherapy and some setbacks along the way.

In the end, it worked. Her success story has been told on multiple network news shows and in major magazine stories, and she has now become a life mastery coach and consultant for others who are facing life challenges. On my suggestion, a former colleague of mine who was diagnosed with cancer recently met with Marisa and then sent me a note saying it was transformative, thanking me for connecting them. He now feels he can turn his life around.

As I concluded my recent conversation with her, I felt enriched, almost giddy, and more fulfilled personally. But the real point of Marisa’s story is not about beating cancer, but instead, taking control of your life—at work, at home, in your relationships, and in your hobbies. While Marisa talks about the incredible holism and fulfillment in her life now, it was not always so. Cancer was the trigger to rethink many things going on and the level of fulfillment she was experiencing. Her business success taught her that you can create a far different outcome if you work from design, instead of
accepting what comes your way by default.

This book is about the journey to developing a profound sense of fulfillment in your life, but also as HR professionals, to increase fulfillment in the workplace. The purpose is not simply to realize its humanitarian value, but also, to achieve important business objectives—better and longer tenured hires; higher engagement; more focused and productive work; and stronger, more resilient employees who can weather and even thrive in continuous change. It is not an easy road, and it will be harder for some, but it is a road that can lead you to an incredible richness in your life and those of your employees. I will focus a good deal on you and your fulfillment in a number of segments of the book, but you can apply most of the same thinking to your employees. Furthermore, I will address the role of HR and what HR can do now to begin to create fulfillment. I am confident that along the way you will not only become more enlightened but that you will see many ways in which this knowledge and thinking can enable your employees.

There is no such thing as a perfect ability to predict success or fulfillment, but you can stack the odds in your favor. That is exactly what Marisa did. She focused on her life goal and did everything in her power to manage her life drivers, which I will discuss in a later chapter. She was steering her life ship in shark-infested waters of naysayers. She is a role model for me—and now for many others—of how we must draw on all of our energy to achieve our dreams.

Her story, my own journey, and my experiences with so many people I have interviewed over the years have provided the impetus to dig deeper into fulfillment, to conduct additional research, and to share what we have learned about life fulfillment with others. Upon reflection, just as Marisa said a decade ago after the shock of her initial diagnosis, I realized that many of the tools that we use in business can be of great help to us as individuals. And conversely, as we have studied employees more deeply, I realized that there is a good deal that we can bring from their lives into the workplace to create better employee experiences and more productive cultures.

Fulfillment comes from having achieved a deeper sense of purpose—one that combines the end-of-life gratification that one’s life has been meaningful, as well as the ongoing day-to-day happiness that is important along the way.
Career fulfillment, the fulfillment that comes from meaningful work, is either the number one or the number two driver of life fulfillment for most people. Career fulfillment is tied to the work that your employees do every day. Is it aligned with their career goals? Does it allow them to also achieve non-work goals? Is it in sync with learning objectives? Are employees thriving and growing or burning out and becoming obsolete in their knowledge? I will explore these issues further because when work is seen as highly connected to life goals, employees are more productive, engaged, and healthy—a winning combination.

Are You Fulfilled?

Would you say you are totally fulfilled today—feeling not only daily happiness or job satisfaction, but a deeper sense of your mission in life and where you hope to end up eventually?

A majority of people we studied said no. And yet, nearly all the people I meet or interview tell me they would like to be more fulfilled.

There is growing evidence that certain factors contribute to a fulfilling and satisfying life. And the good news is that we have a good deal of control over those factors. While studies vary somewhat, research has shown that we can control 40 to 60 percent of our happiness, while only a small percentage of happiness is explained by differences in life circumstances. As researcher Sonja Lyubomirsky describes in her book *The How of Happiness*, “Whether we are rich or poor, healthy or unhealthy, beautiful or plain, married or divorced” only contributes 10 percent to happiness.\(^1\) While we cannot control where we are born or alter our genetic makeup, we can still influence our daily happiness and many factors that lead to life fulfillment.\(^2\) \(^3\) Before we explore the keys to fulfillment, I’ll tell you a little about my path and how I got here.

My Journey

Like many high school students, I tried different classes as well as different part-time and summer jobs. In school, I pursued music and science, both of
which I excelled at and liked. My jobs included being a retail clerk, a lawn mowing and landscaping worker, a drill press operator, an assembly-line worker, a camera salesman, a cub reporter, and a road paver (I only lasted one day in the tar!). But each of these opportunities (I didn’t see them as opportunities then) afforded me a chance to rule out certain paths in my life—ones I knew would not be fulfilling for me. At the same time, each experience gave me an opportunity to think about what would fulfill me.

While my grades in high school were good, I had no role models in my extended family to look to. No one had gone to college before me. And guidance counseling in my school was nonexistent. My father worked six days a week, and my mother worked full-time (at a time when most moms stayed home) trying to save enough money to provide opportunities for my sister and me. I realized that I was breaking new ground. I knew I liked music, math, and science, so I tossed the dice, selecting an engineering school that appeared to combine the latter two.

At age nineteen, I could have used guidance when I concluded that my primary major in college was not a good fit for me, and I needed to find a new path forward. I knew I enjoyed being an entertainer at a radio station and the financial and political challenge of serving as the treasurer of the student government. I also enjoyed playing cards and touch football with friends, but those avocations led me to the Dean’s List. No, not the Dean’s List you may be thinking of, but academic probation. I was told I had one semester to improve my grades or I would be DJ’ing and playing cards on the street. I spent serious time feeling afraid and reflecting on my options. I did not want to fail my parents who had worked so hard to enable me to go to college, but most importantly, I couldn’t let myself down. I had always thought of myself as a winner until then.

Two things changed my life, almost by accident. I began dating my future wife, and I found that I particularly enjoyed designing experiments around slogan awareness as a research assistant in a consumer psychology laboratory. In fact, those roles played key parts in my decision to switch my major from engineering to organizational psychology, which led to me adopting a good study routine that earned me a spot on the other Dean’s List, finishing college with close to a 3.5 average.
I had found my way based on having oars in many waters. It was not a direct route but a variety of experiences that led me to an engaging life path. What I failed to realize at the time was that I had the capabilities to succeed, but I was not aligned with clear goals and often not deeply engaged in something I was passionate about.

I tried several jobs along the way—recruiter, editor, real estate agent, and even a night shift key-punch operator. However, those jobs were not aligned with my values, they underutilized my skills, or did not engage me. Ultimately, I realized that my dream life would combine my dream girlfriend and integrate my keen interests. So, I asked my girlfriend to marry me (thank goodness she said yes!), and we began planning our joint career paths together, which took us to graduate work together at the University of Illinois.

My next great nexus was choosing among a narrower band of options: teacher, researcher, or HR practitioner. I started that decision path with teaching roles at the University of Iowa and Georgia Tech. Despite my love of research and teaching, somehow at age twenty-seven I still felt unfulfilled. I wanted to live the theories I was teaching—to test those theories in real organizations. But even after my transition to a major telecommunications firm that afforded me a chance to combine both research and practice, a few years later I still felt something was missing. I accepted a job offer to lead a research practice for a global consulting organization, and that is when I found what was missing.

This experience prepared me for my best-fit role—the creation of the Metrus Group, which would last thirty years (so far!)—one that has brought deep enjoyment and personal fulfillment for me. This career choice blends my keen enjoyment of research and analytics with my entrepreneurial and leadership skills, while also giving me the opportunity to work with and make practical changes at hundreds of real organizations. The satisfaction of making a difference is not unique to me; it is one of the most fervently voiced desires of scores of interviewees we talked to on this journey to discover fulfillment. But I had to find my own way to make a difference—one that capitalized on who I was and where I wanted to go. And it took me until age thirty-nine to discover my dream career.
I begin this book by talking about career satisfaction because it is the number one element of life fulfillment for the majority of people that I interviewed in my research. The second most important element for the majority of my respondents consists of their relationships, typically those with a primary friend or spouse, supported by a network of other relationships. My journey to life fulfillment is not atypical. Parts of this journey were necessary to discover life’s lessons, but many parts were not. I wasted periods of time going down blind alleys. I taxied through many roles without truly taking off. I drifted dangerously close to academic or career waterfalls that could have drowned me.

As I reflected on much of this and my experience with people like Marisa, I set out to discover if there was a more effective and rewarding way to reach one’s dreams.

**What Is Fulfillment?**

Psychologist and researcher Martin Seligman of the University of Pennsylvania is often seen as the father of the field of positive psychology, turning our eyes toward the full glass rather than a glass half (or more) empty. Rather than focusing on clinical dysfunctions, he and now many other psychologists have focused on what makes us satisfied, happy, or even delighted.4

While I began my own work with an eye toward how individuals and organizations come together for win-win outcomes, research and the many interviews we conducted for this book shifted direction to a broader issue of fulfillment—an enduring quality that includes both daily happiness, but more importantly, a long-term, sustainable sense of achieving all one can be. Most of my interviewees talked about the difference between a fleeting win such as a pay raise, promotion, or even winning the lottery—and a long-term sense of purpose and accomplishment in their lives.

So, when someone asks me if fulfillment means satisfaction, happiness, success, achievement, or inner peace, I say yes, because it must be compounded of a variety of factors. I define life fulfillment as achieving one’s dreams and creating a lifestyle that brings exceptional happiness and
inner peace. An adjunct to this is being all one can be. Perfect fulfillment is rarely achieved. It is an ideal that most of us seek. The most fulfilled people seem to be closer to that dream than others. That is good news for us, and probably part of our biological makeup, because if we were totally fulfilled, we would stop growing, developing, learning, and adapting to the world around us.

There has been a good deal of work on many of the concepts I mention here, but what is absent by and large is how we plan to get to fulfillment. Much research shows that we need to feel a sense of control over our destinies in order to achieve happiness. Some societies and organizations, for a variety of economic and social reasons, create environments in which people feel a greater sense of control, resulting in greater happiness and other positive outcomes. But regardless of the context, individuals can proactively increase their control through their actions.

This book addresses key factors that enable you to have greater control and influence over your life. The approach suggested in this book may help to marry the rational thinking of your left brain—goals, skills, facts—with the emotional needs and interests of your right brain in the search for happiness and fulfillment. This requires self-awareness, planning, making choices, taking stock of where you are, and being honest and realistic. The framework in this book will help you think through choices and make conscious decisions about work, family, community, volunteerism, and other situations.

We all want to be successful, but more importantly, we want to feel fulfilled. Unless success is in the context of a vision, it may feel fleeting. Success is often attached to things—getting a promotion, making more money, getting that special person to say yes, or winning the lottery. Even top executives that I interviewed—people with money, fame, and power—are not all happy or fulfilled. The money, fame, or power did not always bring about fulfillment.

It was also exciting to learn that the techniques used by those who are most fulfilled are easily transferrable to people who are open to hearing them. I was fortunate to eventually arrive at an exciting place in my life after a winding path; but our research team has interviewed many who have bounced from college major to major, job to job, or relationship to relationship without having discovered the deep satisfaction of fulfillment.
No, you cannot guarantee someone a perfect road to fulfillment, but you can increase the odds greatly! If you are looking for a happier and more rewarding life, this book is for you. If you are a coach or mentor, this book will give you insights into helping others. And if you are a human resources or organizational leader, this book will provide insights into how you can attract, develop, optimize, and retain the best talent—talent that will find your organization and its culture rewarding as they pursue their personal journeys to fulfillment. Too often, those who study organizations shy away from the overlapping sphere of personal space for career, counseling, and clinical psychology. When individual and organizational alignment occurs, individuals feel fulfilled and organizations benefit from outstanding performance—a win-win for all.
Part I: The Challenge
Chapter 1: Mack and Mary

“People take different roads seeking fulfillment and happiness. Just because they’re not on your road does not mean they are lost.”
— Dalai Lama, Spiritual Leader

When a child is born today in the most economically developed parts of the globe, he or she is likely to have 34 million minutes to spend on earth—over 41 million if the child grows up in the United States or another highly developed country. When you remove the 2.6 million minutes in which one is too young to be aware of that window of opportunity, and approximately 10.7 million minutes in which no one has much control over life, such as during sleep, that leaves just a little over 21 million minutes—quite an allotment of time to achieve your life fulfillment or not. The question is: How wisely are those minutes spent?

Take Mack, who is seventy-five and sees himself as highly fulfilled. Mack feels delighted every day. He is retired from a long career with a manufacturing company. He has had good and bad bosses; a loving family; and many close friends, neighbors, and members of his community. Despite the long hours at his job, Mack found time to volunteer throughout his life, such as serving at a community volunteer fire department. Volunteering was also part of his family’s DNA; his wife helped children with disabilities. Mack always finds time to talk with his neighbors, and loves to mow his lawn even though he could ask his son or neighbors to do it.

Contrast his life with that of Mary, who at age forty-five is miserable. She has lived life through everyone else’s expectations. Her parents were well educated and had high hopes for her to achieve success in a respectable profession. She had aunts and uncles with many accomplishments. Her educational program was parent-driven, and getting less than an A was simply unacceptable to them. While she excelled in school through her law degree, she nearly dropped out. She really didn’t like law (or medicine—her father’s preference); she actually liked theater and art.

As a young adult, she tried to become part of a local theater troupe and to
take acting classes, but her parents dissuaded her. And even after she was married and talked about giving up law, her husband was not supportive of the idea. After having a child she was unsure about having, she felt trapped because of her family’s financial situation. Mary took on the weight of others’ expectations instead of her own and saw her options collapsing. She didn’t have a vision for her own life, clear goals, or a way to manage out of her past and current dilemmas. She focused on what didn’t happen instead of what could still happen.

In this book we will address some easy and important things that you can do to set the table for a fulfilling life and career:

- Understand what fulfillment is and is not
- Identify what separates those who are fulfilled from those who are not
- Learn about the “science” of fulfillment—what are the principles that enable you to plan, decide, and take action that will bring career and personal fulfillment
- Apply the “art” of fulfillment—what are the lessons from the most fulfilled people that you can apply to your life and career
- Learn how human resources professionals can leverage fulfillment in the workplace to better achieve goals

This book may take you a few hours to read, but I hope it will provide a lifetime of fulfillment.
Chapter 2: How Fulfilled Are You?

“The good life is using your signature strengths every day to produce authentic happiness and abundant gratification.”
— Martin Seligman, Psychologist, Educator, and Author

Before we dig into the ingredients of fulfillment, you will find it helpful if you assess how fulfilled you are today. Here is a short questionnaire. If you would rather access it online, visit www.wschiemann.com/planning-tools.

Add the numbers you chose. If you score higher than 45, you are one of the lucky few who is highly fulfilled. If you score between 35 and 44, you are

![Figure 1: How Fulfilled Are You?](image)
Please rate each of the statements from “Strongly Agree” to “Strongly Disagree.”

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Agree</th>
<th>Agree</th>
<th>Neutral</th>
<th>Disagree</th>
<th>Strongly Disagree</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. I have a life purpose and clear goals.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>2. I feel successful with my job and career.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>3. I am satisfied with the relationships in my life.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>4. Most days I can act consistently with my inner values.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>5. I have one or more hobbies or spiritual activities that bring me enjoyment.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>6. I spend most of my days satisfied.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>7. When I have setbacks from my goals or plans, I know how to turn that around to my advantage.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>8. I am healthy.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>9. I have sufficient education, skills, and experiences to do what I want to do in life.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
<tr>
<td>10. I have a way to measure my life fulfillment.</td>
<td>5</td>
<td>4</td>
<td>3</td>
<td>2</td>
<td>1</td>
</tr>
</tbody>
</table>
moderately fulfilled. If you score below 35, there are many things that you can do to become more highly fulfilled that I will address in the following chapters. As you will see, these questions cover some of the key factors that drive life fulfillment for a majority of us.

In the first chapter, I gave a few examples of fulfillment. Let’s take a look at a couple of examples from different walks of life to help us understand what distinguishes those who are fulfilled from those who are not.

What Are the Ingredients of Fulfillment?

Famous chef Danny Meyer has created restaurants as diverse as Union Square Café, a high-end food establishment in New York, and Shake Shack, a fast-food emporium that has patrons queuing up in long lines to wait for, well, the ubiquitous burger.¹ His decade-old experiment, now being mimicked in many cities, demonstrates that certain fine dining principles, such as premium, fresh ingredients and good service, can be profitably applied at even the margin-thin, quick-serve level. What are the right ingredients that will go into your fulfillment?

Three of the most important ingredients are called ACE (Alignment, Capabilities, and Engagement), and I will explore them with you in detail in Part II. We discovered ACE in our work with organizations and found that these ingredients of success were applicable for both organizations and individuals. Are we aligned, capable, and engaged in what we do and where we are going in life? People who are high on ACE feel more fulfilled in their lives. They stay in jobs longer, are more productive, report less stress, and have other positive feelings. We will explore why that happens and how you can increase the ACE in your life.

You will learn what it means to be a high ACE individual in both work and non-work aspects of your life.

Science of Fulfillment

Most of us don’t think about the words “fulfillment” and “science” in the same mental image. But there is actually a set of principles that underlie the
road to fulfillment. Each of these principles is accompanied by tools that can be used by you to plan for and manage your life fulfillment. The principles are not rocket science, per se, but elude many people because of habits, distractions, or missing skills that could be readily improved. Let’s take a look at the primary principles:

- **Clear life goals.** Where would you like to end up by the end of your life? Will you have created the value that is important both to you and to society? What will you be remembered for?

- **A set of success drivers.** These are the actions or elements that cause high versus low fulfillment, and they are often missed.

- **A life map.** This is a visual representation of how life goals connect to where you are today so that you can plan and invest your time wisely.

### The Art of Fulfillment

But there is also the art of becoming fulfilled. While I’m sure that many of us could read a book on running a restaurant and apply the scientific principles rigidly, we would probably fail, having missed the art of success. Think about one of your favorite artists—possibly Renoir, Adams, Rembrandt, Braque, or Picasso. With a paint-by-number kit, we could more or less reproduce the basics of one of their pictures, but would it be great art? Hardly. The brush strokes, layering, perspective, and many other fine touches must come together to create great art.

While the science will provide the basic principles and supporting tools for creating a life-fulfilling plan, it will be the judgments, decisions, and appropriate applications of those principles that make your life truly fulfilling. Can you avoid roadblocks? Are there shortcuts? How do you recover when derailed? These are the tricks of the trade that we only learn from those who are fulfilled, or discover through our own long, painful process of trial and error.

Do you remember starting a new job? Remember all the things in your training and prior experiences that enabled you to succeed? These were the ingredients of success. Then there were all of the things that you were told by
the hiring manager and other interviewers that would be important to your success—hitting performance targets or goals, living the company values, applying high-quality principles of your trade, using the right measures, listening for performance feedback, and so forth. In many ways, these were the formal steps or the science of success. But then, during your first week on the job, you talked to a few coworkers who began to share the hidden rules of success. These may have been things like “Don’t contradict the boss,” “Don’t outshine the team,” “Volunteer for special projects,” and the like. This is the art of success—the street smarts versus book learning.

The same is true in finding fulfillment. Yes, there are principles or steps—the science—that will help you realize your vision. But it will also take art and finesse; lessons we have learned from others who have already traveled this road and have achieved fulfillment. These tips—a combination of the art and the science of fulfillment—will take you a long way toward your goals.
Part II: The ACE in You

“We spend so much of our life at work or commuting to work that the majority of our waking hours are connected to work. That is why it is so important for companies to build cultures that are fulfilling.”
— Gil Casellas, Lawyer, Businessman, Former EEOC Chairman

One Monday morning, a colleague of mine was in a wonderful mood. She said she had the most exhilarating weekend. Keri spent time with her kids, went to a baseball game, went shopping, had a delightful dinner on Saturday night, watched a movie, took an aerobics class, caught up on her paperwork, and luxuriated in a long bath. And, if that wasn’t enough, she also reviewed a recent business article and proofed a report for a client. When I asked her what made it so exhilarating, she said that she blended so many of the activities she loved to do during the weekend. The opportunity to combine and coordinate her favorite activities was wonderful. When she added, “It’s too bad work isn’t like that most of the time,” it got me thinking.

Kurt, a friend of mine, has a different story. Kurt thrives on his work—closing deals, tackling and solving new work-related problems, and schmoozing with clients over beers. His problem is balancing that with the other areas of his life. His first marriage, I sensed, fell apart due to his constant preoccupation with work. He had not developed hobbies or much of a social life, and the constant stress of work and only work took its toll.

What was it about Keri’s great weekend that was so much more exhilarating than a day at work? And what was so compelling about Kurt’s work that he let it drown out other aspects of his life? Is there a right balance?

During a conversation with Keri, I discovered that the things she did over that weekend represented different segments of her life that brought her fulfillment, including work she spent time on over the weekend. For her it was the variety of things that she immersed herself in that made the difference, with few distasteful activities. Kurt, on the other hand, loved one aspect of his life but felt that he was unbalanced, leading to feelings of dread.
when he was not working.

I wondered how we could integrate work and non-work activities into our lives in such a way that the overall balance is as close to exhilarating as one can get. After many years of research, I got my answer by looking at both individuals and organizations and how they optimize the one common commodity that they all have: time.

Think about other ways that we optimize our lives—trying to get the most out of our weekends by balancing sports events, kids’ programs, exercise, TV time, great meals, and making time for hobbies such as gardening or rebuilding a car. When organizations try to optimize their talent, they are doing something similar. They are trying to find the right mix of experiences, abilities, interests, and behaviors in the pursuit of the organization’s vision and goals.

How do we leverage the time and ability of a fast-food employee with the equipment provided to maximize the service experience of the customer? And how does the fast-food employer balance training, communication, and incentives to create knowing and caring employees who come to work eager to delight customers?

How can someone in a product development role successfully balance his or her time between inventing new products, staying current in the latest technology, and recharging innovative brain cells when not inventing work-related products? How do we leverage the time of busy executives, and how do we help those executives to balance other areas in their lives in order to give them the patience to coach employees, deal with stressful situations, and reach productivity goals?

The same concept can be applied to our own lives, as Keri’s example highlights. How do we create the right mix of work, family, hobbies, and other key areas of our lives that will give us optimal fulfillment? In selecting a career or job, what mix of activities will create the most enjoyment and satisfaction for you?

**Work Is Important for Most**
In our interviews with people, we found that work is a strong factor in determining life fulfillment. While the part-time “gig economy” is growing, and there are many entrepreneurs, still a majority of people work full time in organizations. So while many of my stories will pertain to the organizational environment, the principles in this book are equally applicable to all types of work, relationships, and avocations.

Research from the Metrus Institute tells us that only about 20 percent of the departments in over two thousand organizations that were studied have done a good job of optimizing their investments in people—that is, they are getting the most energy and performance for the money they are investing in talent. Just think of the waste in business today—people working long hours on low-priority projects that will never see the light of day, employees struggling to satisfy customers but without sufficient training to do so, or managers squelching the excitement that an employee first brings to work. These are just a few of the ways in which we suboptimize the precious talent that organizations have available in their people.

Three Powerful Drivers of Fulfillment at Work

In my work with the Metrus Institute, I discovered a concept we coined “People Equity.” It has been powerful in helping us to understand how well people and their talents can be optimized in organizations—in other words, being all they can be. People Equity is composed of three factors that are crucial to optimizing talent—you and me—in organizations. These three factors are abbreviated as ACE (Alignment, Capabilities, and Engagement).

• Alignment: People who are aligned with the organization’s goals, values, customers, and others with whom they work

• Capabilities: People who have the “right” capabilities—the competencies, information, and resources—to meet or exceed customer or client expectations

• Engagement: People who are engaged with the organization and are willing to put in additional effort as needed to accomplish goals, willing to recommend the organization as a place to work, and willing to volunteer for special projects at work or in the community
Collectively, we have labeled these three ACE factors as People Equity. I will first discuss how we use A, C, and E in a company or organization environment, but these principles hold equally true if you are an entrepreneur, a student in an academic environment, a home manager, or someone creating a community environment.

When an organization has high People Equity (ACE), the Metrus Institute has found that:

- organizations are more profitable or reach their goals more effectively;
- customers are more loyal and buy more;
- employees stay with the organization longer; and
- quality is higher.

The organizations that achieve high People Equity (high Alignment, Capabilities, and Engagement) share a distinct advantage over their competitors because they have discovered a way to optimize the talent of people in their organizations. And the individuals also win as we shall see shortly.

**What Happens When ACE Is Low?**

Another way to think about how ACE affects us is to consider what happens when ACE is low. Figure 2 summarizes the outcomes of low Alignment, Capabilities, and Engagement. As you can see, low ACE leads to many dysfunctional consequences, such as overstaffing, burnout, high rework, and low productivity.
ACE and the Individual

These aren’t just corporate problems—they are individual concerns as well. People lose energy, stress levels send them over the edge, and they begin to unravel in both their work and home life. As you can see in Figure 3, individuals are in situations with higher conflict and lower teamwork, face monotony or frustration due to more rework, deal with increased stress that can lead to burnout, have low energy levels, and can become apathetic or cynical. Those we have interviewed over the years describe coming home drained or overwrought, often leading to strained relationships with spouses or children. Some will leave their organizations, but that also can create family and career disruptions. In short, low ACE hurts both the organization and the individual.
Big Bang

But what happens when both the organization and the individual have high ACE? Bang! I know you have seen it. Individuals and teams thrive; the company, association, agency, or department often exceeds its goals; and there is a wonderful feeling of accomplishment and fulfillment.

Based on our case studies, focus groups, and interviews with hundreds of people, we believe that high ACE is a win-win for both the organization and the individual. Most of us have experienced that wonderful moment at work when we or someone around us is revved.

While individuals and organizations both thrive when ACE is high, other players are important in creating an environment in which that can happen. That is, they are enablers that allow this Big Bang to occur. Human resources professionals, senior leaders, and immediate managers can play major roles in creating environments in which this occurs. For example, has the organization actively hired people who will feel energized in its culture? Do senior leaders provide a compelling vision of the future? Does the immediate manager value individual differences and leverage each person to his or her
best strengths?

The same can be said of relationships. Do your relationships energize or deplete you?

The remainder of this section of the book will include three segments on Alignment, Capabilities, and Engagement in which you will begin to see how you can create high ACE for yourself and for others.
Chapter 3: Alignment

"I find that I am most happy and healthy when I am living in alignment with my goals, dreams, and principles."
— Dr. Steve Maraboli, Speaker, Author, and Behavioral Scientist

When I was driving on a dusty road to Tijuana many moons ago, alignment was the first word that popped into my head. The road—when it could be called a road—was full of huge, car-swallowing potholes. At the end of this road were many auto repair shops waiting for their prey—wobbly-wheeled drivers like me. Back then, alignment was most often used to describe how well tires on a car were calibrated to move in sync to minimize tire wear. Today, the term is often used in a different context. Are a husband and wife aligned about how to raise the kids? Are employees aligned with their organization’s values or purpose?

Alignment at Work

In the work context, as described before, alignment can be most simply expressed as, “Are we all rowing in the same direction?” One colleague described an episode when he was a camp counselor on Lake Coeur d’Alene. “Two boys were in a canoe, which was spinning around in circles. Both were paddling furiously, but not balancing each other’s strokes. Neither had a clue why they weren’t making any progress.”

This drives home the picture. Is the organization aligned with the expectations of its customers? Are the senior leaders aligned in the direction of the firm? Are departments aligned with the business strategy and priorities? Is your unit aligned with the goals of the department and organization in general? Are we aligned with our colleagues in our values? Do we all believe, for example, that ethics or diversity are important, or that customer service is a key principle?

When we move to the implications for you, the question becomes: Are you aligned with the job and the organization, your relationships, your lifestyle
(or life choices), and so forth? Or stated a different way: Are the job and organization aligned with your life goals and your values?

Let’s start with your job, first. Take the short quiz in Figure 4 and let’s see what you think. Simply choose the answer that is closest to your view.

**Figure 4: How Aligned Are You at Work?**

<table>
<thead>
<tr>
<th>Statement</th>
<th>Strongly Disagree</th>
<th>Disagree</th>
<th>Neutral</th>
<th>Agree</th>
<th>Strongly Agree</th>
</tr>
</thead>
<tbody>
<tr>
<td>I am aligned with the overall goals and values of the organization.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I have clear, measurable performance goals.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>I understand how what I do adds value to the organization and its customers.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>My rewards (e.g., pay, recognition, autonomy) are closely related to my performance.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>Everyone here shares the same priorities.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
<tr>
<td>My career goals are aligned with the opportunities offered by my employer.</td>
<td>1</td>
<td>2</td>
<td>3</td>
<td>4</td>
<td>5</td>
</tr>
</tbody>
</table>

**TOTAL ALIGNMENT**
Score (add up your score for the questions)

The answers are scored with 5 being highest and 1 being lowest. Add the numbers you chose. A score of 26 to 30 indicates that you are highly aligned in your work. Scores between 16 and 25 indicate that you are only partially aligned. Scores below 15 indicate a level of misalignment.

If you are fully aligned, congratulate yourself: you are among only 31 percent of workers. Over two-thirds of you feel some level of misalignment. The challenge is to understand why you are not fully aligned. Take a moment to reflect on why you think you may or may not be aligned. Jot down a few ideas regarding your level of alignment and what may be causing it.

Let’s take a look at the drivers of alignment—the factors that cause low or high alignment. Some typical alignment drivers include:
• the level of alignment you see between what the organization promises to deliver to customers and what the organization actually delivers;
• your understanding of your organization’s mission, strategy, and priorities;
• your understanding of how your department fits into that plan; and
• the metrics that will be used to evaluate the organization, the department, and your performance; the link between rewards and performance.

At the personal level, alignment drivers include the process for setting the goals you take on, the effectiveness of performance feedback you receive (and listen to), understanding what success looks like, and the link to your rewards. Figure 5 displays the typical alignment drivers.

**Figure 5: Typical Alignment Drivers**

<table>
<thead>
<tr>
<th>Organization</th>
<th>Unit</th>
<th>Individual</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Understand company vision/mission/values*&lt;BR&gt;- Align with the vision/mission/values*&lt;BR&gt;- Understand the customer&lt;BR&gt;- Understand the brand</td>
<td>- Understand department goals*&lt;BR&gt;- Align with other departments&lt;BR&gt;- Understand success measures*&lt;BR&gt;- Clear priorities in department</td>
<td>- Have clear goals*&lt;BR&gt;- Have clear performance measures&lt;BR&gt;- Receive constructive performance feedback&lt;BR&gt;- Have access to coach or mentor*</td>
</tr>
</tbody>
</table>

The next important question is this: Can you control or influence those drivers? If not, you may be in the wrong job, or under the wrong boss, or in
the wrong organization. To avoid prolonged misalignment and its negative consequences, consider how to create change. In the area of alignment, you likely cannot change the level of alignment of the senior team or the direction of the company, but there are things you can do to enhance your alignment and thus reduce the stress of low alignment.

**Taking Action**

Figure 5 shows a list of many drivers of alignment at the organization, unit, and individual levels. The ones that can be influenced most by the individual employee are highlighted with asterisks. For example, while you may not agree with a goal or the company direction, you can certainly take steps to understand what the goals and the direction are.

If you have too many drivers in your situation that are not controllable, it may be better to take a different career path or work for a different organization. The controllable ones may be changed by asking for a new work assignment, moving to a different boss or group of peers, or discussing issues of performance or development candidly with your manager. Communication is key.

If you do not understand the organization’s direction or how your job and the organization fit, you can discuss this with your manager or with a third party. Often, there are other places you can go to read more about it. This requires being proactive and not waiting to be told.

Managers tell us that performance feedback is one of the most difficult things they do. They dread coming into a review meeting in which they will have to give negative feedback about someone’s performance. And most employees don’t make that any easier. Most of us, research says, have higher views of our own performance than the reviewer’s views of our performance. This certainly creates frustration. Psychologically, this can cause us to shut down and not really listen to the full story or to engage in a fruitful conversation. In many cases, both the manager and the subordinate dread the event.

However, some organizations have been able to reduce this stress by increasing the frequency of conversations throughout the year, rather than having a major one-shot event. If your company does not give regular
feedback, it does not stop you from asking your manager to set up more frequent mini-reviews or directional feedback sessions. Some employees have communicated with their bosses throughout the year so that they don’t have the bias of being influenced by what was done most recently. Or some employees send their managers their pre-thinking before the review. This helps the manager see an employee’s viewpoint while preparing for the session. This also reduces situations where the manager feels locked into a position and the employee feels backed into a corner.

The last major area of misalignment is in values. In the movie *The Devil Wears Prada*, journalist Andrea Sachs is looking for work and eventually is hired to be the assistant of the very demanding Miranda Priestly, the editor of *Runway* magazine. However, Andrea does not have a strong alignment between her values and those of Miranda. In order to fit in and do well at her job, Andrea makes extreme changes that end up greatly affecting her work and private life. In the end, Andrea leaves *Runway* magazine in order to pursue a job that is more aligned with her values.

While easier to see in a movie, many of us have been in situations in which it is clear that our values are not in sync with those of others, or of the organization. While every incident should not be run all the way up the flagpole, a pattern of incidents should cause you to question how fulfilled you can be in that environment. Howard Winkler, former chair of the HR Certification Institute, said, “When making a tough decision, stick with your core values. You will be immensely happier afterwards.”

The same type of thinking around alignment can be applied to relationships. For a deeper treatment of this, including self-assessments, please see *Fulfilled! Critical Choices: Work, Home, Life*, by the author, or visit www.wschiemann.com.
Chapter 4: Capabilities

“Man often becomes what he believes himself to be. If I keep on saying to myself that I cannot do a certain thing, it is possible that I may end by really becoming incapable of doing it. On the contrary, if I have the belief that I can do it, I shall surely acquire the capacity to do it even if I may not have it at the beginning.”

— Mahatma Gandhi, Indian Leader

Our second key fulfillment factor, capabilities, includes not only the skills or competencies of people, but also their abilities to bring the right information or resources to a situation. The individual is at the center of it all. As humans, it is important to feel competent. Much early psychological research, beginning with infants and young children, highlights this crucial psychological need. People, regardless of age, want and need to feel competent at whatever they do: raising children, performing a job or hobby, or playing a game. Children who fail at a game repeatedly avoid it in the future; it is too demotivating if you never win.

The same is true at work. If you, or the unit in which you work, are low in capabilities, this spills over to your motivation and your focus over time.

While your view of your capabilities is important, we live in a world that judges the value of those capabilities. At work, it is a manager or an external or internal customer who judges the value of your work. In our personal lives, we have many customers or stakeholders—people that matter in our lives: loved ones, family members, teammates, colleagues on a community board, or hobbyist friends. Anyone who can influence our lives is a stakeholder (or customer, if you will).

Capabilities at Work

Thomas Friedman, the New York Times columnist and author of The World is Flat, says that “being average is over,” meaning that what was medium performance historically will no longer cut it in the new, competitive world.
The performance bar is being raised every day as competition from every side increases—from coworkers or fellow students, new hires, and those offering similar services from other parts of the globe, whether physically or virtually. Friedman contends that those who have unique capabilities will have many job opportunities and earn a lot, while those who do not will be paid little and have low job security.

Are you growing your capabilities so you have as many options as possible in the future? I recently interviewed a vice president of human resources who didn’t start on the fast track. In fact, she started far from it. She was born the youngest of twelve children to a father who was a farmer and a mother who took odd sewing jobs to make money. She just hoped to be able to finish high school; college was out of the question.

Her first job was working as a minion for a tax department, making copies or doing whatever else was needed. From there she launched into an administrative role, then a junior HR person, then a department manager. She attended night school for fifteen years to complete a college degree. After she jumped to a major HR role, she went back to get her MBA to ensure her ability to play in the boardroom.

Today she leads HR for a 1,200-employee bank. A strong vision, clear goals, and a strong attitude, along with the willingness to develop the right skills, enabled her to achieve career success—an integral part of her overall fulfillment.

Are you continuing to develop your capabilities? Take the short quiz in Figure 6 and let’s see what you think. As in the prior questionnaire, simply choose the answer that is closest to your view. Stakeholders include anyone who uses or evaluates your services or work output.
The answers are scored with 5 being highest and 1 being lowest. Add the numbers you chose. A score of 26 to 30 indicates you have strong capabilities to deliver high value to your customers. Scores of 21 to 25 indicate that you have fairly good capabilities. A score of 16 to 20 indicates that there are some capabilities gaps. Scores below 15 indicate major capabilities gaps.

If you have strong capabilities, consider yourself fortunate and well prepared for the next steps in your life plan. Over two-thirds of respondents will feel some level of capabilities gaps. Furthermore, you may want to compare your own judgment as just measured with the perceptions of others. Far more people overestimate rather than underestimate their capabilities compared to others who know them well.

One good exercise would be for you to pick three work stakeholders and ask them for feedback related to your capabilities. Use the questions in Figure 6 as a guide. We have found this to be a helpful reality check. How does your
self-perception compare to others’ perceptions of you? Are you surprised at your score? What areas might be holding your capabilities back?

The value is in understanding why there are capabilities gaps. As we did with alignment, let’s take a look at the drivers of capabilities—the factors that cause low or high capabilities. Some typical capability drivers include: education, being a strong team player, having a good fit between your skills and the job requirements, being a good communicator, having clear expectations of what stakeholders or customers expect, having good measures of the value you deliver, being able to access the right information that you need to deliver value to customers and those around you, and having sufficient tools or resources to be successful in the job or in any task, for that matter.

Figure 7 shows the typical drivers that can influence your capabilities score. The items with asterisks are typically more controllable by you.

**Figure 7: Typical Capabilities Drivers**

- **Personal Knowledge, Skills, Experiences**
  - Background experience*
  - Education/training*
  - Knowledge*

- **Information**
  - Understand customer expectations*
  - Measure your customer satisfaction*
  - Timely information available

- **Resources**
  - Tools to do job well
  - Teamwork*
  - Right resources
The next important question is this: Which drivers can I control? To avoid prolonged capabilities gaps and all their negative consequences, consider how to create improvements. Although you cannot change the competencies of the senior team or your boss, there are many things you can do to enhance your own capabilities, thereby reducing the negative outcome of feeling that you are not having an impact—or that you are not competent.

If you have too many capabilities drivers that are not controllable, it may be best to seek a different job or consider an alternative career path. While that is not always possible, you can at least focus on areas where you have some degree of control. You can seek more training or discuss issues of performance or development candidly with your manager. If that doesn’t work, a human resources leader may be a resource.

**Taking Action**

The most basic driver of capabilities is having the competency to do tasks in your job well. Competencies include your knowledge, skills, experiences, and behaviors. Most of us have a self-perception of those competencies. However, it is important that others who depend on you or evaluate your contribution at work perceive your competencies in a similar way. As is frequently the case, we all have blind spots—areas where others see us differently than we see ourselves.

Periodically get reality checks to ensure that you are not out of touch with how the world views you. For example, are you noticed or recognized for your skills and related performance? Do people come to you for your knowledge or expertise? Does your background or experience provide you with valuable insights that you can use in your current tasks? Have you gotten candid feedback from your boss or peers on how well your skills stack up against those needed for your position?

A key question that I use in my coaching work is: Will they ask for YOU? At the end of the day, you bring one critical element to your organization, and that’s your unique talent. In other words, you bring a set of experiences, know-how, skills, and behaviors to your organization. Are those skills valued at the level they need to be for you to feel fulfilled and for the organization to
feel it is getting a good return on its investment in you?

Value is in the eyes of the beholder, and for you to control your own future, you must offer value to others. To understand that value, customer or stakeholder feedback is important. Most of us deliver something to someone. Stakeholders include any person or group who can influence your success or the success of your unit or organization. When stakeholders view your individual or department work output as having high value, they are supportive. Highly rated departments often have higher budgets, more staff, and more influence than those that are rated low in value. When stakeholders see low value, they withhold support and can even sabotage your success. It is important to know how these stakeholders see your work and that of your organization.

Ideally, your organization uses surveys, focus groups, interviews, or other assessment tools to gain feedback from stakeholders, providing you with important feedback on how they see value. An important new technique called IVA—Internal Value Acceleration—is used by larger organizations to secure feedback from stakeholders about their function and how they can add more value—not simply more time. But even if you do not have this type of formal feedback, you can engage your stakeholders in conversations. Do stakeholders feel there is high value in what you and your unit deliver? Do they frequently thank you for what you do? Would they prefer that your function was outsourced?

Find out the most important thing you could improve. These are self-awareness questions about your performance and the competencies that support your performance.

If your capabilities are low or insufficient for you to feel and be recognized for your mastery, you can take actions to improve those skills or experiences. Talk to your manager, mentor, or someone in HR about ways to grow your skills; most organizations would prefer to retain motivated and aligned employees if they are willing to upgrade their skills. The first step is being honest with yourself about your capabilities, and then seeking support.

A worker at a global pizza chain shared that she lasted merely four days on the job. Why only four days? Here’s her story:
I did not feel I was trained enough to fulfill my job tasks. I did not possess the right capabilities to do what was required of me. For example, I did not receive training on waitressing nor did I know anything about the menu. It was my first days and the restaurant was so busy. I was tossed in as a waitress to fill the gap and be able to serve the customers in a timely manner. However, I was so focused on being able to do things right that I did not focus on other tasks. I spilled a soda on a customer and burned the breadsticks! Overall, at the time I did not have the capabilities necessary to successfully perform at the restaurant and that caused me to dread going to work, and I quit after only four days.

In this case, poor training was a culprit, leading to negative outcomes. If your organization has training that will help you succeed, then you need to be proactive to find a way to access it.

The last major driver area of capabilities is information and resources. If you are short on either, discuss these issues with your manager, work coach, or other leaders. Help them to see how the shortfall is affecting key stakeholders or customers of your organization.
Chapter 5: Engagement

“The energy of the mind is the essence of life.”
— Aristotle, Greek Philosopher

My friend Mike was a model railroad enthusiast. He also loved his job as a programmer and often worked well past business hours. But after work, he would often stay up into the wee hours of the night putting new track in his train line. In the morning, Mike was a bit tired, yes, but happy—I might even say contented and energized—because he had made progress on his model railroad plan. For Mike, it wasn’t work or hobby—it was both. He found ways to balance his energies across both parts of his life.

Psychologists and physiologists tell us this is not surprising. Engagement and enthusiasm have a positive effect on our brain chemistry and our moods and attitudes. Our brains are more stimulated and secrete positive hormones—the opposite of when we feel frightened or threatened.

When you achieve that “high,” odds are that you have high satisfaction. That may be because you have a satisfying boss with whom you share mutual commitments—he or she can count on you to do what it takes for the unit to be successful, and you can count on the boss to support you and help you be successful. Often, there is a strong feeling of mutual commitment to your colleagues and the organization. When you are really revved, you speak positively about the organization because you are proud to be a part of it. On the flip side, stress and dissatisfaction cause a negative cycle of brain and hormonal activity, which can lead to low energy, malaise, and even depression.

Tom, a packaged goods delivery person, said, “I dread getting up on Monday morning. I just don’t get excited about coming in to work.” He is not alone. Many people feel this way. During the last recession, Gallup found that 18 percent of employees felt actively disengaged and 49 percent were disengaged.¹ Aon-Hewitt found that only 62 percent of employees were engaged worldwide.² Every day, many are saying, “Why bother?” in their work environments. Metrus Institute has found that many workers are
partially engaged rather than either saboteurs or totally revved. This is where there are huge opportunities because many of the detractors of full engagement are within the person’s or organization’s control.

Being engaged in your work or personal life is a good thing for you, your employer, and your friends and family. Beyond work, it can mean being excited to put in more time or effort into relationships, hobbies, religion, or other activities. Just as with work, when you are engaged, you volunteer to do things rather than do them out of obligation.

Now here is a critical point: Engagement is not the responsibility of your work situation, your boss, your spouse, your parents, or your teacher. While those individuals may help or hinder engagement, it is up to you to determine if you are engaged or disengaged today, and what you want to do about it.

**Engagement at Work**

Take a minute to complete the questions in Figure 8 to determine your engagement at work. Later, we will apply similar questions to other aspects of your life. Choose the number for each question, from Strongly Agree (5) to Strongly Disagree (1), which best represents your feelings about that issue.
Add up your score by adding the numbers you chose. If you score between 26 and 30, you are strongly engaged. A score of 16 to 25 means you are partially engaged. Scores below 15 suggest you have a good deal of disengagement in your work situation.

If you are strongly engaged, congratulate yourself; you are among only one-third of workers who feel that way today. Again, jot down your thoughts on your current engagement level. Ask yourself: Why do I feel this way? What do I think are the causes?

If you are not fully engaged, it is important to understand why. To do that, we again look to the drivers of engagement. Typical engagement drivers include your supervisor or boss, your pay and benefits, how fairly you feel you are treated, whether you feel recognized for good work or not, communication practices, your growth and development opportunities, your feelings of job security, support from your boss and peers, your comfort with the values or operating style of the organization, and your working conditions.
Take a minute to think about each of the factors listed in Figure 9 and identify the ones that are important but which you feel have a gap from your expectations. Note the two or three most important ones.

**Figure 9: Engagement Factors**

- **Engagement Drivers**
  - Growth and development*
  - Recognition for contributions*
  - Open/translucent communication
  - Mission and values you identify with*

- **Commitment Drivers**
  - Pride in working for organization*
  - Boss supports you
  - Peers support you
  - Clear expectations

- **Satisfaction Drivers**
  - Pay and benefits
  - Working conditions
  - Treated fairly
  - Treated with respect*
  - Job satisfaction

**Taking Action**

The next important question is this: Can you control or influence the engagement drivers? If not, you may be in the wrong job, working for the wrong boss, or with the wrong organization. To avoid prolonged disengagement and all of its negative consequences, consider a change. Perhaps it is only your boss and not the organization. You may be able to get transferred to another unit. If you really don’t like the work, consider a job change. If you disagree with the values or the operating style of the organization, it may be time to shop outside for a new company, if you can.
On the other hand, we have found that low engagement can often be improved by addressing the controllable drivers. For example, if you are not being recognized for good work, ask yourself whether you are indeed doing work worth recognizing. If not, it is time to step up. If you are, it may be helpful to talk to your boss or a coach about why you are not recognized for your contributions. Managers often are not aware of their lack of providing recognition, or they take long-term performance for granted. A conversation can often alert them to the importance of your feeling that your work is valued.

The factors in Figure 9 that are most controllable by you are highlighted with asterisks. For example, if you do not believe in the values or mission of the organization, you should find another place in which you do. Disagreements over values or direction will continue to haunt you, and unless you are the founder or president, it is unlikely that you are going to change them. Pride in your work accomplishments is an area that you control. Only you can be proud (or not) of the work you do.

Mack had a seven-to-four job that required mechanical work. He always talked about doing his work well. Others in the organization could count on Mack for high-quality output. He beamed when he talked about the work he did. He used to say, “Love what you do and do what you love!” And I can tell you, talking to Mack was contagious. He indirectly caused me to eventually move from a job that I didn’t love to one that I did.

Although some areas in Figure 9 may not be totally controllable by you, they are certainly open to influence by you. For example, if you are being treated with disrespect, step up and discuss that with those who are offending you; you may be surprised at how a boss or a peer can change if they realize how much you are offended.

Likewise, if expectations are unclear, sit down with your manager or coach to more clearly set the expectations. Even pay and benefits for some jobs can be influenced by you; if you don’t think you have been considered for a raise or are being paid below similar employees, take action to at least have a conversation with your manager, HR, or an ombudsman, if you are not being heard. Most people have far more influence than they realize.
If you like doing the work, it is more likely the context that needs to be addressed. First, look to see if you have controllable engagement drivers by asking for a new work assignment, moving to a different boss or group of peers, or discussing issues of unfairness or perhaps disrespect.

In this part of the book, you have learned about the importance of ACE as a tool for thinking about how you leverage value for organizations and groups that you interact with, as well as for yourself. We all want to be aligned with something, feel competent, and be engaged in what we do.

In the next section, I will turn to the “Science” of becoming fulfilled and provide proven steps and tools to move from where you are today to a more fulfilled life.
Part III: The Science of Fulfillment

“Truly believe in your abilities to shape the world in which you live.”
— Lance Miyamoto, Chief Human Resources Officer, Catalent Pharma Solutions

If you’re not a scientific person, don’t be frightened. A few of my reviewers were surprised by the word “science” in a book about fulfillment, but you shouldn’t be. After all, there has been a good deal of research into areas related to fulfillment such as satisfaction, success, and happiness. Research can help us eliminate things in our lives that clearly kill fulfillment, and provide guidance into other actions that have been shown to help create a fulfilling and happy life.

In preparing for this book, we conducted in-depth interviews with over a hundred people and surveyed far more across generations to identify the elements that seem to be important in achieving fulfillment. From our review of scientific studies, and from the numerous interviews we have conducted, there are clear guiding principles that are related to fulfillment.

Guiding Principles

The following are elements that may help you create higher career and life fulfillment:

• Create clear life goals—Where would you like to be at the end of your life and how would you like to be remembered? What is your legacy?

• Identify your drivers of fulfillment—the things that lead to high versus low fulfillment.

• Apply ACE (Alignment, Capabilities, and Engagement) principles to help you understand and manage your drivers of life fulfillment.

• Create your life map—a visual representation of how your life goals connect to where you are today, so that you can plan and invest your
future time wisely.

In Part IV of the book, I will share the art of fulfillment. What do more fulfilled people recommend after you have applied the science to navigate the rough waters that most of us will face at one time or another? How have they overcome setbacks? What are their core insights to getting and staying fulfilled? What are the key pieces of wisdom they want to pass along to you?
Chapter 6: Life Goals and Values

“If You Don't Know Where You're Going, You'll Probably End Up Somewhere Else”
— Dr. David P. Campbell, Author, Executive Coach

All of us are driven by a set of values—what we believe is important in life. Do you believe in acting ethically? Is fairness important, and if so, what does that mean to you? Do you believe in sharing with others, or in rugged individualism where only the strong survive? Are you spiritual? Are you conservative or liberal? What is the code of behavior that you endorse?

Successful organizations know that values are essential to success and that they differentiate among competitors. Garry Ridge, the CEO of WD-40 Company (you probably have a can of his product to get rid of the squeaks in your house), is a strong proponent of values. The organization has a set of six values that are the cornerstone of how they expect people to act. If you can’t support those values, they tell you that WD-40 Company is the wrong place for you. Having strong values eliminates the need for lots of rules and policies. The simple question to any employee at WD-40 Company is this: Did you behave consistently with these values?

This example is one of many that exemplifies an important message: If you have strong values, then you don’t need hundreds of rules in your life. The corollary for organizations is that they do not need hundreds of rules if they have strong values with which people are aligned.

What Are Your Important Life Values?

Take a minute to think about your life values. Deep down, what do you hold near and dear? Is it fairness, being ethical, education, service to others, religious or spiritual values, or something else? If you are unsure, ask yourself what others do that make you uncomfortable or upset. Are they violating some important value or principle that you believe in? If someone else was asked to describe five to seven characteristics about you, what
would those be? Are they correct, when you think about your inner self? In other words, is that the real you or a mask that you show others?

In this exercise, it is important to answer for the real you. A note of caution: If you are listing more than seven key values, you are probably not separating out the truly important ones. If you only had five to seven key values, what would they be? The Ten Commandments that Moses brought down from Mount Sinai were later summarized this way: Love God with all your heart, soul, and mind, and love your neighbor as yourself.¹ We want your equivalent of those top values.

To test your values, now add examples of behaviors of yours in the recent past that exemplify each value. The more specific you can be, the better, as it will help to crystallize the meanings of the values.

Then, to understand what falls outside of your values, list one action that you have done in the past that violates each value. Be honest with yourself—we have all fallen from our ideals in the past, and it helps to understand clearly what that looks like. Figure 10 shows an example of a completed table.

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**Figure 10: Behaviors That Exemplify or Violate Life Values**

<table>
<thead>
<tr>
<th>Key Life Values</th>
<th>Behaviors That Exemplify Values</th>
<th>Behaviors That Violate Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fairness</td>
<td>At work, I treat all people the same no matter what their ethnicity.</td>
<td>I sometimes make rude comments because of a person’s background.</td>
</tr>
<tr>
<td>Respect</td>
<td>During arguments with friends, I try not to disrespect them in any way.</td>
<td>At times, I argue with others by insulting or putting them down.</td>
</tr>
<tr>
<td>A Desire to Advance Myself</td>
<td>I try really hard to get good grades in school as well as seeking opportunities to develop myself.</td>
<td>I say I want to get good grades but I don’t always do what it takes.</td>
</tr>
<tr>
<td>Responsibility</td>
<td>When I am being held accountable for something, I try my hardest to get it done as I know others are counting on me.</td>
<td>At times, I fall short on my responsibilities, sometimes letting others down.</td>
</tr>
<tr>
<td>Caring for Others</td>
<td>I enjoy being able to show others that they are appreciated.</td>
<td>I can be cold and uncaring when I don’t like another person.</td>
</tr>
</tbody>
</table>

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¹ Love your neighbor as yourself. This is the adage that Jesus imparted to his followers, the second of the Ten Commandments. It is a simplification of the first commandment: “You shall love the Lord your God with all your heart, soul, and mind.”
What Are Life Goals and How Do They Help?

With a good values foundation, it is time to turn to life goals. The first thing we should discuss is what life goals are. Take a minute to do the following exercise. It will clarify what I mean.

Picture yourself lying on your deathbed, and a trusted friend or family member asks, “Did you accomplish what you wanted to in life?” Your answer helps point to what life goals are. Life goals are the primary things that you want to accomplish over the course of your life, resulting in life fulfillment.

You might reasonably ask what I mean by life fulfillment. What would make you satisfied that you had achieved what you wanted in your life? Those whom I have interviewed often describe life fulfillment as a sense of meaningfulness or purpose to one’s life.

For Mahatma Gandhi, the great Indian leader, professional life began as an attorney, after an English education that prepared him for this field. Along the way, however, he found a different calling. After experiencing apartheid in South Africa and witnessing so much inhumanity in his homeland of India, he found his fulfillment in fighting injustice. As a lawyer, he could craft inspiring arguments for why change needed to occur. But most deliberately, he allowed himself to be thrown off trains or refused lodging as a statement that rallied thousands of new followers. In India, he was willing to lead a hunger strike to rally support against the salt tax that was a severe handicap for millions of poor Indians. Fulfillment was not in acquiring money, power, or tangible goods; he got rid of those trappings. Instead, his fulfillment was in seeing the oppressed freed from the bonds of colonialism—free to make their own choices and self-govern.²

You do not need to be Gandhi to make a difference or to have a fulfilling life. My junior high science teacher changed my life and the lives of many others. Before meeting her, I had not had a teacher who really inspired me. She opened my eyes to the possibilities of a career in science, and did so in a fun, engaging way. She served as a role model—a vibrant person who could engage others and bring out the best in them. It changed my energy and focus, putting me on the path to a math-science specialty in high school that
enabled me to find my sweet spot. Later, I realized that she did that for many others as well.

**Now or Later?**

A further question that I am often asked in my seminars is this: Does this mean we must defer all satisfaction hoping it all comes together at our deathbed? Of course not! Life is to be lived every day and enjoyed as much as we can throughout our lives. The reason that I am stressing life goals so much at this stage is that many other approaches to career, family, or educational planning focus on more immediate goals, but they do not focus sufficiently on the longer-term big picture—the meaning of your life.

While a few lucky souls fall into it, most of us have to think about and plan where we want to be later in life, because every step along the way is either a building block or a misstep toward life satisfaction. Remember my earlier advice: there are no guarantees in life! You cannot perfectly plan every step or event that will ultimately make you fulfilled. But by carefully thinking about the process of becoming fulfilled, we greatly increase our odds of not only getting to life fulfillment but also experiencing much satisfaction along the way. This thought process, coupled with periodic reviews, will enable you to navigate difficult times and life’s blind alleys, and make changes earlier rather than later—thereby creating more fulfilling years along the way.

If others were describing your life, what would you want them to say about you? This is not easy because many thoughts are likely to run through your mind. You might be tempted to write down many short-term goals. This could be helpful to get started, but at the end of the exercise below, you want to arrive at two to four big goals. The other smaller goals or accomplishments can be later positioned within your overall plan, so do not discard them.

For example, two of my life goals are to use my abilities to advance my profession and to have someone who loves me deeply for as much of my life as possible. One indicator of having achieved the latter goal is that I would spend lots of time with this person over as many years as possible. Indicators of the professional goal might be that people in my profession would recognize me for my contributions to the field, or that I would have produced
tangible things (such as books and articles) that lived on in the field long after I am gone. The important thing is to come up with goals that are meaningful to you.

**Life Goal Planning Exercise**

Now, on a blank sheet of paper, list the two to four life goals that you would like to reach, and then list the indicators of what each would look like. Figure 11 shows an example. After you have completed your life goal exercise, we will dig deeper into how to achieve them.

![Figure 11: Example of Life Goals and Indicators](image)

<table>
<thead>
<tr>
<th>Your Life Goals</th>
<th>Life Goal Indicators</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Finding a life mate</td>
<td>Having many years of being with someone who is my soulmate</td>
</tr>
<tr>
<td>2. Being financially secure</td>
<td>Having enough money that I will never have to worry about my financial well-being</td>
</tr>
<tr>
<td>3. Becoming famous</td>
<td>I would like to be recognized anywhere I go</td>
</tr>
<tr>
<td>4. Being recognized for my contribution to my profession.</td>
<td>I would like people to reference me and my work for the value it added to society.</td>
</tr>
</tbody>
</table>

**Balancing or Integrating Your Life Goals**

Before we leave the setting of life goals, take a moment to reflect on balance. Balance means having goals in different aspects of your life—perhaps professional or work-related, social, personal or family-related, physical or health-related, financial, and so forth. We often find that one-dimensional people are at first seen as successful, but upon further reflection, realize that they often have something missing in their lives.

Many corporate examples of this abound. For too many executives of the Greatest Generation and the baby boomer generation, their life model was what William Whyte labeled the “organization man”—a person dedicated to success defined by his or her role in the organization.³ Many CEOs and
executives describe broken marriages, lost relationships with their children, or forgotten sports or hobbies—all in the interest of climbing the corporate ladder.

When many of them retired, they found emptiness. They were no longer the honchos of their prior world, which extended to golf clubs, social events, and other areas of constant recognition that they had achieved at the pinnacle of corporate life. Instead, many found that they needed to find soul mates, repair broken family relationships, and find meaningful ways to spend their time. The title and money alone were not creating fulfillment.

Today, many millennials are actively replacing this old model with one that is multidimensional by integrating family events, social media friends, organizational commitments, health and exercise, hobbies, and volunteer activities. Many are finding fulfillment in variety and balance achieved through the effective integration of varied parts of their lives.

What is the balance in your life? How well are you integrating important parts of your life? Take a look back at your life goals and ask yourself whether your goals are balanced and integrated.

**A Balanced Framework**


The life goals of most people fall into six primary segments:

1. Career, occupational, and job
2. Relationships, social, and family
3. Education, learning, and personal growth
4. Leisure such as hobbies and sports
5. Spiritual, religious, and community
6. Hygiene, such as eating, sleeping, and health
While not a life goal per se, we are all constrained by biological necessities such as sleeping, eating, and exercising. I have certainly met individuals for whom one of these activities is a life goal or a critical part of their life fulfillment. I have known gourmands who live to eat, and a former IT technician who was obsessed with time in the gym to be all he could be physically. Figure 12 provides a way for you to think about important goals you might have in each of these areas.

Some people find ways to combine these goals or to mix elements of each. More and more, we are moving into an integrated world in which different segments are blended into our lives. For example, the line between work and home life has blurred for most employees. Some individuals now find ways to pray, practice yoga, or engage in spiritual activities at work. Many high-tech companies have fostered innovation by combining play and work. Google has a bowling alley for teams to mix play and team development. Many organizations that want to foster innovative ideas, such as advertising agencies, research groups, or software design teams, have games such as foosball or ping-pong tables, allowing their employees to mix play and work, often producing great ideas.
To meet your life goals, what percentage of your time would you ideally like to spend in each of the six major segments?

A good test before moving on is whether you think you can achieve your life goals in a manner that is consistent with your life values. Look at the intersection of each value and goal and identify ones that may be difficult to accomplish while living your values. It is important to have a conversation with yourself about how you will resolve this conflict. If you don’t, it will come back to haunt you later.

**Life Goal Gaps**

A key question that is begging to be answered is this: How do you get from where you are today to your life goals? First, we need to figure out where we are today and then do a life gap analysis to understand how short or far we have to move or adjust our current life path in the time we have available to steer in the right direction.

If swimmer Missy Franklin wanted to break international or Olympic records, she had to focus on where she was at a particular point in time and compare that to an existing record or benchmark. How could she shave time off already-impressive records? For the most part, athletes today have equal access to dynamically engineered swimsuits or running suits, the best running or jumping shoes, or similar poles for vaulting. The Olympics is about people using the same tools and time (they each have twenty-four hours a day) to achieve their goals by managing the drivers of those goals—things such as hard work, building the right muscles, disciplined training, or the right advisors and coaches. If your gap is shaving off 1.57 seconds in the butterfly stroke, you focus on all the ways you can save time—stronger muscles, cleaner strokes, or fewer strokes.

So that is where we all must begin, knowing where we are today and measuring that against our goals.

And remember, this thinking works at every age from teenagers to centenarians.
**Where Are You on the Road to Your Life Goals?**

So, let’s assess where you are on your life goal path. Write down your life goals on a piece of paper. For each life goal, rate how close you are to achieving it on a one-to-ten scale, with 1 being lowest (you are not at all close) and 10 meaning you have already achieved it or are living it today.

It is okay that your ratings are a rough estimate because only you can rate your progress against your vision of what a ten would be. In some cases, you might want to get feedback from others, such as a coach or mentor.

The gap (ten minus the number you give it) represents the distance that needs to be closed to hit your life goal.
Chapter 7: Stepping Stones: What Are Your Lighthouse Goals?

“It’s a lot easier to cross the river if you know where the stepping stones are.”
— Anonymous

Lighthouse Goals

Unlike the fictional Superman, most of us can’t leap to our goals in a single bound. We find it helpful to identify intermediate lighthouse goals. I use the term “lighthouse” because ships do not seek to hit the lighthouse—it is not their ultimate goal. Instead, the lighthouse provides guidance that the ship is on course and helps the captain to avoid shoals or to enter the harbor safely.

Another way to think about lighthouse goals for athletes, or for any of us, is as a comparison to a standard along the way. When my niece Lindsay was ice skating competitively, she realized that she was not only competing for absolutes (landing a triple Lutz) but also in comparative performance against others. The gold medal in the Olympics goes to the fastest sprinter, the best shooter, the highest jumper, and so forth—whether they break a world record or not. If your goal is setting a world record, you may be happy with getting a gold medal at the Olympics, but experience some disappointment for failing to break the world record.

Figure 13 shows an example of lighthouse goals for different life goals.
Figure 13: Life Goal with Supporting Lighthouse Goals

**Lighthouse Goals**

- Credentialed in a profession
- College degree required for profession
- Meet and marry the right spouse
- Have children
- Practice in a name law firm
- Have a law degree
- Achieve rankings at local/state/national level

**Life Goal**

- Success in respected profession
- Be surrounded by loving family
- Become a judge
- Become a tennis star
As we think about lighthouse goals, I hope you are thinking about what will cause your life goals to become reality. Lighthouse goals provide a beacon to your life fulfillment, like the lighthouse to a ship signaling that it is on course. The lighthouse does not ensure the ship will avoid all of the rocks or get into the harbor safely, but it helps the captain determine if the ship is on course. But what powers us to these lighthouse goals?

A number of success drivers contribute to reaching both lighthouse and life goals (see Figure 14).

Success Drivers

What do we mean by success drivers? What do they look like? In this section, we take a look at examples and encourage you to identify several drivers related to the life goals that you are working on. Figure 15 provides examples of these success drivers that are related to the life goals and the lighthouse goals in Figure 13.
Figure 15: The Connection of Success Drivers to Lighthouse Goals to Life Goals

**SUCCESS DRIVERS**
- Apprentice in the profession
- Identify respected professions
- Start dating/define desired characteristics of spouse
- Decide on best time to have children
- Have sufficient income to support family

**LIGHTHOUSE GOALS**
- Credentialed in a profession
- College degree required for profession
- Meet and marry the right spouse
- Have children

**LIFE GOAL**
- Success in respected profession
- Be surrounded by loving family
- Become a judge
- Practice in name law firm

High LSAT scores
Admission to top law school
Intern with name judge
Strong legal network
Each of the success drivers on the left side of Figure 15 drive outcomes that steer our paths toward our lighthouse and life goals. For example, former Secretary of State Condoleezza Rice was building her case for a role beyond judge through her undergraduate and graduate education, studying Russian, and taking time to specialize in Soviet studies and Russian politics. This enabled her to network with people like George Shultz, Ronald Reagan’s Secretary of State, and Brent Scowcroft, who advised Gerald Ford and George H.W. Bush on national security, ultimately bringing her to the attention of the White House.

The FiveWhats

These are examples of the kind of cause-and-effect thinking that will help you think about how to get to your lighthouse and life goals. Some goals are more intangible, such as being respected in your profession. For those, you will need to think about the logic chain that helps you get to the life goal from prior actions (taking a course) and lighthouse goals (getting a degree). Start with your life goal and ask the five whats:

• What are the intermediate steps that may be critical to achieving a life goal? That is, what lighthouse goals are important?

• To get to those lighthouse goals, what are the success drivers you will need to achieve them? This is where it often pays to get help from coaches or mentors, as well as to do research on the internet.

• What are the actions—steps that you can take right now—that would lead you to those success drivers?

• What is your level of interest in those actions and success factors? If you don’t have much interest in doing the things that are on the critical path to your goals, then you will not be very motivated to complete the path.

• What are the key competencies—aptitudes, abilities, knowledge, skills, experiences, and behaviors—required to do well in those actions and to achieve the success factors? If you do not have a good aptitude for a particular path, then you soon will become frustrated and likely lose
interest or motivation to continue along the path.

**Why Are Competencies and Interests Important?**

Competencies refer to the aptitudes, abilities, knowledge, skills, experiences, and behaviors that you bring to work, relationships, and other activities in your life. These are the raw ingredients of success and fulfillment. These elements must come together in a fashion that creates value for you, an employer, a spouse, or others if you wish to be successful in any endeavor.

Interests provide the fuel to further develop competencies. Most of us know someone whose parents pushed him or her into music lessons, a sport, or other activity in which they had little to no interest, only to discover later that the individual did everything he or she could to avoid practicing or spending time on the activity. Perhaps that was your experience. Regardless of your natural aptitudes, if you are not interested in something, you are unlikely to be motivated to spend the time to excel at it. This is often the case of college students who switch majors after they had been encouraged by parents or teachers to become something that they had the skills to do, but lacked the interest.

On the other hand, if you don’t try new experiences, you may miss something you could love for the rest of your life. I initially thought that I would dislike opera. But my wife “discovered” opera in graduate school when a friend was working on sets for an opera company and asked her to come along. She heard *Tosca* and instantly knew that she had found something amazing. Her infectious enthusiasm (and prodding) finally got me to attend a performance at The Met in New York. After seeing Verdi’s *Rigoletto*, I too was hooked.

Don’t miss out on opportunities to expose yourself to new possibilities that you may find transforming in art, music, auto repair, woodwork, gardening, pottery, yoga, or travel, which many of our interviewees told me came later in their lives, to their delight.

Regardless of your stage of life, having a clear path from today’s actions to your drivers, lighthouse goals, and life goals is essential. However, this life
path has to be realistic, given your aptitudes, abilities, knowledge, skills, experiences, and behaviors.
Chapter 8: A Picture Is Worth a Thousand Words

“Every now and then one paints a picture that seems to have opened a door and serves as a stepping stone to other things.”
— Pablo Picasso, Artist

As Dorothy said in *The Wizard of Oz*, “I want to go home,” but she didn’t know how to get there.\(^1\) In the prior chapter, I talked about identifying the key success drivers and lighthouse goals that will help you achieve your life goals.

The adage that a picture is worth a thousand words aptly applies here. We have found it helpful to develop a picture that can help you see how your drivers will get you to the goal. In this chapter, I will share how these pictures or life maps will enable you to see your overall life road map while at the same time being able to zone in on where you are today and the things you need to do now. Once again, this picture, like many in life, needs constant adjustment as life tosses us new challenges or opportunities. It will be important to update the picture as time moves on.

**Building a Personal Value Map**

Take a look at Figure 16 and the value map for becoming a judge. It shows the path to achieving this goal.

Your own value map should capture your thinking today about your life path. If you have been following the process in the prior two chapters, you will not have far to go to connect the dots. The way to construct the map is to start with the life goals on the right—your end objectives—and work back to the left. What are the intermediate lighthouse goals that will be important to get to the life goals? In turn, what drivers are important to get to the lighthouse goals?

For example, the goal of becoming a judge (Figure 16) on the right includes the intermediate lighthouse goals (immediately to the left) of getting a law
degree and practicing in a name law firm. To the left of “practicing with a name law firm” are drivers, such as getting into a good law school, scoring high on the LSAT, interning with a name judge, and having a strong legal network.

Building the plan starts on the right, but implementing your plan begins on the left because you have already built a logic chain of what is most important to do today (left) in order to get where you want to go tomorrow (right). The drivers on the left are where you will want to focus attention today. If the person who completed this map is three semesters away from graduation with a bachelor of arts degree, then the immediate focus is on getting great grades in the remaining courses, learning things that will help achieve high scores on the LSAT, staying healthy, and curtailing social time to a level that will balance current enjoyment while continuing to make progress on the short-term critical path actions.
I know from personal experience. As I discussed earlier, when I went to college, I was like the kids in the movie *Willy Wonka and the Chocolate Factory*. I wanted to experience everything—listening to interesting professors, eating somewhere outside of home, talking with kids on my dorm floor, playing drums in my band, being a DJ at the campus radio station, playing pinochle to all hours of the night, and running for student government.

I wanted to do it all but didn’t have a plan for how to balance all of those desires. When I was elected treasurer of the student government, life couldn’t get much better—until I got the call from the dean about my dismal grades. I was in a state of shock. I quickly realized that I did not have a plan that was connected to my goals; in fact, my life goals were at best fuzzy. Like many children and students, throughout my life I had had a clear path laid out for me—compete in band, get merit badges in Boy Scouts, finish elementary and high school, and get into college.

I realized then that I needed sound thinking and good coaching. One friend whom I respected on my dorm floor was quite honest: “You don’t study effectively and you goof off too much.” Although he was not my type—way too studious to the expense of other interests—I realized that there was a lot of truth to his statement. My friend’s coaching helped me to realize that I really did want and need the degree from this university to do many things that I wanted to do later. I would need not just passing grades, but strong grades.

After much soul-searching, I calculated what I would need to do for my remaining five semesters—assuming they let me stay! This gave me hope because it was still technically possible to graduate with over a 3.5—a split between an A and B average—and develop a track record of great grades for my second half of college. Was I willing to do what it would take? Even with hard work, what were the odds of suddenly going from a B/C/D student to an A student?

But it was thinking about my map (although it wasn’t as clearly articulated in my brain at the time) that changed my life. I knew I would be climbing a mountain, and that there were no guarantees of getting into graduate school, of high graduate school entry exam scores, or even getting a great job, but I
had to try.

I went back to that studious dorm mate and said, “Can I move in with you next semester?” I think I heard his jaw hit the table. “You want to move in with me? You? Do you realize how hard I study? Are you prepared to keep hours that don’t disrupt my sleep or study habits?” he asked. I asked for his help to teach me how to become a better student. He reluctantly agreed; after all, I was a bad bet from my prior behaviors. But it was the turnaround of my life. I had a clear set of drivers that I needed to focus on:

• picking a major (I had already had three!) that I would enjoy;

• taking classes that would stimulate and prepare me for graduate school and the GREs;

• taking on this colleague as a mentor and giving a new study approach a fair chance;

• learning new study habits; and

• keeping a smaller number of social and developmental hobbies that provided immediate fulfillment to balance my life (for example, I wanted to be a good student council treasurer and even run for president in the future, so I gave up the radio station and limited my card-playing to a specified number of hours per week.).

Creating Your Map

If you have done a good job of identifying the drivers in the previous exercises, creating the map will be fairly easy and provide you with a snapshot look at your life path today. As I have said throughout the book, this is not set in stone. Things change, but we would not expect your life goals to change radically in the short term. They may change after lifetime milestones such as getting married, having children, or losing a loved one, but the more you have thought about your life in the future, the less you will need to ditch the plan and make radical changes.

Take time now to put your life goals, lighthouse goals, and drivers into a map that shows the cause-effect relationship among them. Consider the following
in putting it together:

- Do the life goals on the far right feel right when you look at the picture?

- Is it balanced? Consider short- and long-term drivers, leading and lagging indicators of success and balance across your life at each stage. Have you balanced your social and career needs? Have you balanced short-term actions with long-term goals?

- Do you have a clear set of short-term drivers that you agree are the most important immediate areas to focus on in your life?

If you have fewer than ten elements to describe your life path, it is certainly too few. If you have more than twenty-five, you are probably pushing beyond manageability. Having twelve to sixteen important drivers and goals will be more effective than thirty minor drivers and goals that overwhelm you, causing you to lose focus. As you can see from the prior examples, one to three life goals are typical among those I have interviewed, with perhaps three to six lighthouse goals, and five to eight drivers to steer you to the goals.

For more on how to measure goals and progress, see the full version of the book *Fulfilled! Critical Choices: Work, Home, Life* for a more in-depth look at measuring life and lighthouse goals, drivers, and your overall plan.
Chapter 9: Finishing Your Plan

“Planning is bringing the future into the present so that you can do something about it now.”
— Alan Lakein, Author

While we can and should dream of what will bring us fulfillment, we also must be practical in finding a path to achieve those dreams—one that stretches us but does not require impossible assumptions. Getting a bachelor’s degree, a law degree, and a medical degree are all possible, but it would not be practical to do so at the same time.

Joe Montana, one of the greatest American football quarterbacks of all time, could also have been a basketball star. Montana was offered a basketball scholarship to North Carolina State University, but chose to go to Notre Dame and focus on football. Bo Jackson tried to do both; he was a college superstar in both baseball and football. In fact, he was such a superstar that he accepted professional roles with both the Kansas City Royals baseball team and the Los Angeles Raiders football team. Although the teams tried to accommodate his schedules, he soon found that the physically punishing nature of football would certainly limit his career in baseball, so he dropped professional football and concentrated on baseball.

Could Bo Jackson have known when he was ten that he would face this choice? Unlikely! However, with a life plan, it is possible to pursue paths that provide you with multiple choices. In other words, some activities will assure that you still can choose multiple paths in the future.

I will provide an example from my own life. I began college in electrical engineering (EE), taking the core courses required. When I decided in my third semester that I didn’t prefer EE, I switched to industrial engineering with almost no loss of time or effort. Still, I was unsure of engineering and began to take courses in accounting, labor relations, and psychology that would enable me to still have choices, depending on how well I liked these different fields. I tentatively switched to accounting but realized that it did not have enough of the people element.
Eventually—five semesters into college—I found a curriculum of industrial psychology that combined elements of industrial engineering, industrial relations, and psychology in a way that felt exciting. Despite only having three semesters remaining in a standard curriculum, I was able to concentrate in that field and complete my bachelor’s degree in four years. However, I had tried four different directions during that time. What enabled me to experiment was a rough plan that continued my education in courses that were foundational for a variety of different directions, using what I learned about myself, as well as the course content, to shape my final decision.

While this description sounds wonderfully insightful, in hindsight, it was less so during that period. However, it could have been more effective if I had applied the principles of this book that I have since learned. One’s career, love interests, and hobbies should not be a matter of luck, but honed to one’s unique nature. I was lucky to hit the right path with some foresight, but I also watched friends crash and burn during that same period because they bet the ranch on electrical engineering or literature and painted themselves into a corner, either running out of money for college or running out of energy.

The critical point is that there is great value in having a life plan, but it needs to be flexible to account for changes in interests, life events, and the world at large.

**Building a Sound Life Plan**

It is helpful to consider one’s interests, goals, and opportunities in a more thoughtful way than I did in the early stages of my life. However, my story contains an important lesson: it is never too late to adjust. Life will have many turns and challenges, and planning will help you adapt to the circumstances—not predict perfectly what you will do. One of my reasons for writing this book is to enable others to reach these stages sooner than I did—to think about fulfillment earlier in one’s life.

A good plan will not only include life goals, lighthouse goals, and drivers, but also the activities that will be necessary to reach those goals. Transcribing your life map into this plan will help put everything into perspective. Figure 17 provides a sample of the goal of becoming a successful entrepreneur. For
example, if you want to be a successful entrepreneur, you have to start a business (lighthouse goal), and to do that with the greatest success, you will need to test ideas in a safe environment, create a business plan, and find funding (success drivers). Reading about other entrepreneurial successes and failures will often help avert early disaster. Better yet, talk to entrepreneurs.

Next, what kind of support will you have? If you have a spouse, will he or she be supportive in a variety of ways—financially, mentally, and emotionally? You will also need to know about how a business operates, so business or entrepreneurial courses may help. Finally, what are you willing to sacrifice in other aspects of your life to be successful as an entrepreneur? Are you willing to give up softball games, or change expectations about working only forty hours a week when a growing business needs sixty hours or more?

This kind of thinking will help you plot your course, with a greater likelihood of being successful at what you ultimately decide you want to do.

Perhaps another life goal is seeing the world, and that requires getting started early. You will need to take actions today—studying exciting places to visit, talking with other travelers and travel agents, finding a job that enables you to travel sufficiently and provides enough income to take trips, and ensuring that your other key relationships will be supportive of your travel.

And while travel may be a good counterbalance to the stresses of being an entrepreneur, you may have to sacrifice travel at certain stages of starting and running a business. In some businesses, it may be impossible to have both of those goals. My auto mechanic friend works six days a week to make the business successful. He takes trips periodically, but it would have been unrealistic for him to have a life goal of travel. The two simply are not compatible in his current business configuration.
Marisa’s Scorecard

At the beginning of the book, I shared the story of Marisa who suddenly discovered she was afflicted with stage 4 pancreatic cancer. Marisa used the balanced scorecard and planning methods that I have described, resulting in goals, drivers, and actions in Figure 18 for her battle. Her unitary life goal at this point was getting and staying well. If she didn’t, nothing else would matter. Her lighthouse goal was progressive milestones toward recovery leading to remission. Drivers included hiring the best advisors and creating a healthy lifestyle, supported by a variety of key actions, such as adopting an anti-cancer diet, interviewing oncologists to be on her team, exercising daily, and taking workshops on healing.
After fighting and winning a life-threatening battle, Marisa felt transformed. She then took stock of where she was in life, and in addition to staying cancer-free, she set a revised life goal of “making a difference for people facing life-threatening diagnoses.” She set a lighthouse goal of seeing other patients succeed, drivers such as getting the word out in media and becoming an expert coach, and actions that included writing articles and running workshops (see Figure 19).

<table>
<thead>
<tr>
<th>Actions</th>
<th>Drivers</th>
<th>Lighthouse Goals</th>
<th>Life Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Take leave of absence from work</td>
<td>Take charge—CEO of my own life</td>
<td>Progressive improvement—key milestones</td>
<td>Getting &amp; staying well</td>
</tr>
<tr>
<td>Create vision and daily visualizations</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Explore energy, healing, acupuncture and health workshops</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Start anti-cancer diet, green drinks, supplements</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Exercise daily</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire top oncologist who believes I can get well</td>
<td>Hire top experts</td>
<td>Cancer in remission</td>
<td></td>
</tr>
<tr>
<td>Embrace chemotherapy</td>
<td>Medical treatments</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Think about activities and competencies that may be important to successfully reach your drivers or lighthouse goals. Begin listing them, keeping in mind the 80/20 rule which says that 20 percent of the time we spend on something is likely to deliver 80 percent of the value. What are two to four of the most important things that will allow you to hit your drivers or lighthouse goals?

### A Successful Plan

A successful plan will have several elements:

- desired outcomes;
- clear and specific actions or activities;
- a timetable for accomplishing the actions;
- an evaluation tool; and

![Figure 19: Life Goal Map for Making a Difference to Others Facing Life-Threatening Diagnoses](image)

<table>
<thead>
<tr>
<th>Actions</th>
<th>Drivers</th>
<th>Lighthouse Goals</th>
<th>Life Goals</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revisit vision and daily visualizations</td>
<td>Maintain happy/healthy lifestyle</td>
<td>Cancer in remission; pronounced cured</td>
<td>Staying well</td>
</tr>
<tr>
<td>Exercise daily</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Healthy diet</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Manage energy</td>
<td>Become an expert in healing</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Conduct ongoing workshops and support groups</td>
<td>Connect with patients facing difficult situations</td>
<td>Help patients find the way</td>
<td>Making a difference for people facing life-threatening diagnoses</td>
</tr>
<tr>
<td>Share story/write about experience</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Say ‘yes’ to TV appearances/press requests</td>
<td>Appear in print/media</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
a revision of the plan as needed.

These five steps will help you draft a solid plan. Let’s take a look at each element.

**Desired outcomes.** Desired outcomes are the results you hope to achieve if the actions and activities are successful: a law degree, a job, a master mechanic, or a competitive snowboarder. Be specific.

**Clear and specific actions.** It is helpful to make sure that your actions or activities are clear and specific.

For example, taking a course in political science or being active in a debate or speaking club are clear.

Becoming a better communicator or taking relevant courses is too vague.

**Timetable.** Actions or activities are only relevant if performed in a specific time frame. For example, studying for a law exam three years early may be of little help if you don’t take the exam soon. If you want to prepare to perform in a piano concert, you want to peak at the right time. It will not help if you start practicing a concerto too early or too late.

**Evaluation.** Plans without evaluations are useless. How will you know if your plans worked? A quantitative evaluation may provide precise numbers, but a qualitative one may provide more depth of understanding. For example, if you take courses with the plan of getting a 3.5 GPA to get into grad school, you will know whether you hit that mark. If you have eight courses to go, you will need an A in four and a B in four, for example, to hit the target if you are already at a 3.5. However, a qualitative evaluation may help you understand how well you are learning what is in the courses.

Qualitative judgments can be valuable in other ways as well. You took a yoga class to feel relaxed; did it work? Perhaps ask yourself, on a scale of one to ten, how relaxed you feel. If you are still stressed, perhaps massage or exercise might be a better activity. In this case, your judgment is most important.

Another example of evaluation is that which is garnered from your stakeholders: family, friends, and colleagues. Let’s say that you are thinking
about law or public relations as a vocation. You decide to take a communication course to become a better speaker and communicator. During the course or at the end, it might be helpful to ask friends or colleagues: “Do you think I am communicating better?”

**Revision.** All plans need revisions. The world is constantly changing, and even our best-laid plans are subject to adjustment to make them relevant to new information or circumstances. After you have implemented actions or activities in your specified timetable and have evaluated the impact of them, you may want to adjust your plan. Perhaps the actions were less effective than you had hoped. The prep course did not raise your test scores, for example. Or the courses at the community college did little to improve your GPA. It may be time for a bit of soul-searching. Were there other actions or activities that you passed over that might have been more effective?

You might also need to revise your plan due to unexpected situations. Let’s say you had dreamed of becoming a professional basketball player and had the necessary skills to do it. However, due to an unexpected injury, you can no longer play. What changes must you then make to your life plan? Is there a plan B? Might you focus on becoming a coach or a personal trainer?

**Plans Are Not Forever**

“While being planful, be willing to ad lib. Life presents unexpected opportunities, and if your nose is too close to the grindstone, you’re likely to miss them.” That’s sage advice from Howard Winkler, retired human resource leader from Georgia Power and former chair of the HR Certification Institute.

If you have developed strong values and a strong vision of your life goals, your path can be molded in different ways to get there within your values. One acquaintance had planned carefully for a career in biology and got a PhD from one of the best universities in America. He then interned for a large corporation with a great reputation. However, he struggled to try to get into research roles that were fulfilling. He always seemed to be chasing research money or tenured slots. Although he never quit, he became more and more cynical about the system and how it didn’t reward truly committed people.
At some point, I think he would have been better off to turn his attention and incredible mind to an adjacent field because his relentless pursuit of this life goal was no longer leading to his life fulfillment. It also took a toll on other parts of his life because his spouse, who had been very supportive over many years, was beginning to show signs of frustration. He became a sort of Don Quixote in search of an impossible dream.

Take your plan and use it for what it is—a time capsule for what is best for you now. However, you should view it as a temporal plan to be adjusted and updated continually over your life.

Take time now to reflect on your life plan. What actions would be most important for you at this stage of your life? Can you find ways to combine actions that will help you toward several goals?

**Life Is Short; Do the Important Things While You Can**

It is not wrong to be totally immersed in one’s profession. One colleague in Europe was totally immersed in his profession for over twenty-five years before finding a steady girlfriend, who later became his wife. Today, he combines family and travel in a way that fulfills him. It is not for us to judge whether he was fulfilled during those workaholic years. However, the purpose of writing this book is to enable you to plan such actions consciously, not allowing them to happen as chance.

I was preparing to take a trip across the Southwestern United States—an incredibly beautiful area with majestic mountains, the Grand Canyon, desert life, and intriguing Native American villages. As I was telling another colleague who was exceedingly successful in his career about the trip, he stopped me suddenly and said, “You are good to be doing that. You are so lucky!” I was taken aback because he was certainly someone who had the money to do so if he desired. So I asked him what he meant.

He proceeded to tell me about missing so many years of enjoyment with his family, travel, twenty-plus years of stress, and suffering a heart attack in his forties. I had no idea. He always put on a good game face at professional
meetings. Now he has the money to live in a great retirement community, play golf four days a week, and travel, but he related to me that he missed so much along the way.

Life is about making choices and having no regrets. It is my hope that this type of planning and thinking will enable you to embark on a journey—regardless of where you start—that has no regrets.
Part IV: The Art of Fulfillment

“It is good to have an end to journey toward; but it is the journey that matters, in the end.”
— Ursula Le Guin, Writer

Fulfillment is not only about planning for the future, but also about learning from the wisdom of others and applying it to your own life. One group we studied included about one hundred seasoned individuals who had multiple jobs, had lived in different locations over the years, and had at least the outward appearance of success.

But once we dug below the surface, we found a high degree of variability in levels of fulfillment. We found a modest number who were highly fulfilled, many who were partially fulfilled, and still others with very little fulfillment. In looking at the most fulfilled, we discovered life lessons and practices that were often different from those who were less fulfilled.

In this chapter, I selected the five most frequent strategies for achieving success and long-term fulfillment that we learned from our interviewees. For a description of additional strategies not included in this chapter, see two strategies here or the full text of the book Fulfilled! Critical Choices: Work, Home, Life.

Some of these strategies will fit your unique situation more than others, but these strategies have been used by people of all ages and across many different industries, geographies, and walks of life.

Quite simply, they represent wisdom from those who have traveled life’s paths.
Chapter 10: Five Life Lessons to Achieve Fulfillment

The following are five lessons that will help you (and your employees) to find and maintain a high level of fulfillment in life and work.

Lesson 1: Keep the End in Mind

The most important lesson passed along by our fulfilled panel is to keep focused toward the end goal—fulfillment! This book has been about creating goals and managing success drivers and activities that will lead you to fulfillment.

Remember that we each have the same twenty-four hours in the day. So, how are we going to spend that time? Earlier in life, it may be more difficult—so many paths, opportunities, and advisors—to ferret out what will bring us fulfillment. For less-advantaged individuals, the options may look grim. The challenge may be identifying even one path or finding even one personal advisor who cares.

But keep in mind that research has shown that fulfilled individuals come from all walks of life and backgrounds. Being born with a silver spoon is no guarantee of fulfillment, and being born impoverished may limit opportunities, but many influential leaders, successful people, and fulfilled individuals have come from the ranks of the poor. The one area that most of the fulfilled people agreed on is that you cannot be happy, successful, or fulfilled without giving thought to your future vision and how you might get there. The earlier we can ascertain meaningful goals, or at least eliminate paths that do not bring fulfillment, the more quickly we can accelerate the road to a life of fulfillment.

Earlier we acknowledged that what fulfills you today may be different than what fulfills you tomorrow. But unless you think about it, you are likely to spend more and more time on actions and decisions that will not lead to your fulfillment.
Lesson 2: Build a Social Network (But Have at Least One Fantastic Friend)

How important are friends? With the surge of social media, it appears that we are more connected than ever before. And yet, as Lon, a millennial, reflects, “I have tons of contacts but only a few good friends.” What was interesting is that those we interviewed in every generation said something similar. Extroverts have a far more developed network of contacts than did introverts. A few introverts said that they don’t participate in Facebook, LinkedIn, and other social media sites and they limit their communication to a rather small network. Extroverts, on the other hand, took pride in how many Facebook friends or LinkedIn connections they had.

While the level of communication varied, it seems that the one factor that makes the biggest difference is having a couple of close friends. Karin joked, “I ‘friend’ a lot of people on Facebook, but I only really have three friends—true friends.” Those friends are the ones that she goes to for objective feedback about herself.

Others such as Ralph said that he got out of school, took positions in Europe and Asia for about four years, and everything was riding high. He met his wife during those years. And then the bottom fell out. “My specialization in Japanese language and culture all of a sudden went from high demand to no demand.” Ralph became seriously depressed, looking back over twelve years invested in something he loved and that he had bet his career on.

His only true friend, his wife, Martha, got him through that period. She provided both the sympathy to acknowledge his feelings, but also the kick to move him on. She convinced him that he had good writing skills and could be an editor. Eventually, he began applying for related positions and started with modest jobs that later grew into the role of editor. Japanese culture and philosophy became his serious hobby, while his day job provided income and a sense of accomplishment.

If you want to be fulfilled, find and develop a few great friends. I use the term “develop” because several of our interviewees recounted that they had lost good friends from earlier in their lives due to neglect. They were too
busy with family or career or a hobby, and the relationship withered and died. When you have good friends or believe you are developing friendships, make sure you put in the right time and contribution to evolve the relationships. Friendship is a two-way street. The very same characteristics that helped these people—listening, caring, and sharing objective feedback—are also important to give to friends when they are in need.

While friends count, a note of caution was offered from our fulfilled panelists. If you hang out with people who are disengaged, cynical, and mistrusting, then all of their coaching will lead you down a path to perennial unhappiness. If you hang out with people who are engaged, they can provide realistic counsel on how you can get unstuck.

Find them, grow them, and nurture them!

**Lesson 3: Always Seek Things You Are Passionate About**

This was one of the most frequently repeated messages from those who had been around the proverbial block many times. These sages said anything worth doing is worth doing well—with passion. That includes jobs, relationships, hobbies, friends—essentially anything you spend time on.

Now it is easy to say that in hindsight—and most of these comments were from people looking back over their lives and the lives of others they had watched. On the career front, David P. Campbell said, “Follow your passions . . . do what you are passionate about and forget the money.”

When I asked those who said “follow your passions” whether they followed that advice when they were starting out, about one-quarter said yes, almost half said they followed the money, and the rest took a variety of paths that often balanced their passions and their needs to support themselves or their families.

Many recalled that their friends kibitzed, parents pushed, or a spouse or partner cajoled them toward a job that earned more pay, a position close to home, or something that was safe. But in hindsight, 90 percent of them said
that following your passion was the surest way to happiness. Most also admitted that you have to live and find a way to earn enough money to support yourself. Many of those who followed the money said it was addictive; first they had a genuine need to repay college or other loans or to start a family, but over time the money too often drove decisions. The most fulfilled took jobs that fulfilled them personally—not just filled their wallets.

Passion is not restricted to work. For many, a passion is associated with relationships. Many of our interviewees had been divorced or recalled relationships that were not passionate. And when they talked about being passionate, it wasn’t just about sex. It was about a depth of feeling. In my own life, the way I would describe it is that I still get butterflies in my stomach when I hear my wife’s car pull into the driveway.

A fair number of people talked about staying in relationships that were not passionate—certainly not fulfilling—for far too long. Those who stuck it out for long periods of time describe many psychological scars—depression, anger, bitterness, remorse, and sadness. Far too many described long periods of their lives that were devoid of excitement, creativity, and enjoyment.

What’s interesting to note is that outsiders often see their friends in the frying pan unable to get out. Sometimes friends provide the needed boost to help their half-grilled friends from becoming dinner. Those without a strong network seemed to suffer more. They didn’t have others they could fall back on for support, or even objectivity. That is why one of the key recommendations is building a strong network of friends. Great friends and mentors can often support the introspection you need to make important decisions.

Regardless of your situation, you can always dream. Not all dreams will come true, but without dreams, none will come true.

**Lesson 4: Never Stop Learning—NEVER!**

Not only does your body need nourishment and strengthening, but so does your mind. Many of our interviewees talked about the importance of continuous learning, especially as it relates to remaining marketable, inside or outside the current organization. An increasing number of people are facing
job obsolescence. Auto workers, accountants, or radiologists in Western countries have been replaced by cheaper resources in India, butchers have been replaced by packaged-meat suppliers, printers like my uncle have been replaced by digital printing. Daniel Pink tells us that if something can be automated, it will replace a job, sooner or later.

Why is this happening so much today? Primarily due to the rate of change: higher expectations of customers for new and better products; easy access to global markets; and speed of technological change. For example, consumers expect at least one major new phone release annually or more often. It took centuries for agriculture to change and hundreds of years for transportation to change, but since the Industrial Revolution, such change has occurred in mere decades. Since the internet revolution, change is happening in years, months, or minutes. New businesses, products, and processes are being created in fractions of the time it took historically, creating obsolescence for some and opportunity for others. For every change and innovation, something else will be displaced. The key is to ensure that it is not you.

So how do you do that? Our grandparents could bank on developing a skill or expertise that would last them a lifetime. One generation later, my father, uncle, and some of their cousins saw jobs they had relied on, in printing, meat cutting, steel, or accounting disappear. Many baby boomers have not been able to count on one career path based on skills that were learned in high school or college, and that is only accelerating for Generation X, millennials, and Generation Z.

Specialist or Generalist?

“Become a specialist” was the motto for many years. “Don’t become an auto mechanic—become a tire specialist, an audio specialist, or a transmission specialist. Don’t become a general practice doctor—become a cardiologist or a brain surgeon.” This has led to a dilemma today. We have people, often with dated skills, who are a mile deep in their expertise but only an inch deep in anything else. Today, millennials can’t think this way. They must assume that they could have three, four, five, or more “careers.” This means learning specific skills that will help in the short run, but developing other, longer-term skills that will be valuable as they cross career specialties.
Likewise, HR professionals can no longer assume that being an expert in benefits will last a lifetime. They may be called upon to be good generalists, gain expertise in rewards and comp along the way, and know a considerable amount about hiring and selection. If not required to do so now, they are likely to be called upon to understand HR globally, and know the answers to questions like, “What are common hiring practices in the European Union or China?” Potential employers within or outside your organization will be looking at your credentials. Are you certified, indicating that you have broad knowledge that can be used not only for the current position but also for future ones? Have you kept your certification up? One of the values of ongoing certification is that you have to stay current, and this is valued by employers.

The trend today is to compile a suite of skills that are often held by excellent generalists. And if your passion is to achieve more senior levels, then a portfolio of skills and experiences across a host of HR areas—training, leader development, coaching, change management, succession planning, talent acquisition, and overall business acumen—will lead to a more rounded set of credentials that may help you earn one of the top spots.

**Life Skills**

The key today is to develop marketable skills that can be used in the near term while honing important life skills that will be valuable over time. For example, communication skills were singled out by many of our panelists. Most felt that their communication skills have been important throughout life, whether presenting themselves for a job, a promotion, or an idea.

Many we interviewed spoke about the importance of effective writing skills and even astute body language. In the book *The Presentation Secrets of Steve Jobs*, author Carmine Gallo attributes much of Jobs’ success to his ability to do all of the above.³ His presentations were knockouts that convinced the world to do different things, and his body language exuded confidence and passion.

No matter what job you take or group you join or spouse you marry, communication is one of the biggest secrets to success. Start early, speak
publicly, take courses to hone those skills, and be careful of overuse or inappropriate use of emails, texts, or tweets. And remember: great listening skills go hand-in-hand with great communication skills.

**Lesson 5: Resilience—Find the Silver Lining**

Most people get knocked down many times during their lives; the winners get up and try again. Many of our interviewees talked about the importance of developing resilience to setbacks, personal failures, or medical adversity.

“Grit” is a term defined by Angela Duckworth in her TED Talk as “passion and perseverance for very long-term goals.” According to Duckworth, grit is a predictor of success. Grit is about living life focusing on the end goal without losing motivation despite setbacks.

Take Mike Schultz, a competitive snowmobiler and snowboarder who lost his leg in a snowmobile crash in 2008. Upon passing another competitor, he lost control of the vehicle and was thrown from the machine. He hit the ground so hard that he was looking at the bottom of his foot in front of his eyes. Sadly, his leg could not be saved. For most people, this would have meant retirement and time to consider a desk job. But not for “Monster” Schultz: he was fitted with a prosthetic leg and got back on the snowmobile.

But his story doesn’t end there. The best leg that doctors could fit him with couldn’t take the impact of that sport. So what does a true competitor do? He designed his own leg! He took parts from mountain bikes and built a prosthesis that not only allowed him to compete but to win silver at the Moto X Racing Adaptive only seven months after losing his leg. The following year when the X Games added adaptive snocross, he took gold. After his amputation, he also took up snowboarding. This is true grit.

This is a man who had never machined in his life. For most people, the accident would have been enough to slow down. But for Mike, he wanted to do more for others facing similar situations. He started a business using his new designs to supply these tougher-than-real-legs prostheses for former military amputees and others who wanted to get up and compete.

Now compare that to most of our lives. Most of our fulfilled interviewees had
setbacks, often ones that people who knew them didn’t realize. But they had a turning point when they mentally started to compete again and turned bad luck or situations into gold.

Take a look back at a handful of situations in your life that have been disappointments—lost jobs, spouses, accidents, medical setbacks—and how you reacted in the situations. Were you like “Monster” Schultz? While you can’t go back and change those earlier situations, thinking about what you might have done differently to get the ball rolling again should help you when the next setback occurs.

Resilience is an area that can be greatly helped by a support network—friends, family, and spouse. Many of our fulfilled panelists described how important one or two other people were to them during moments of doubt or during setbacks. Often a mentor or coach encouraged them to stand up and fight, stop and rethink their direction, or let go of a toxic relationship. Most of our advisors said that the hardest thing to do is to remove the emotion and look at the facts. Quite often the facts are not as dismal as the perceived setback, and even when they are, they provide a baseline for the climb out of the downward spiral.

A key lesson in all of these stories is perseverance. Even when things are dismal, some individuals rally to greater heights to overcome their maladies. Many people whom we interviewed talked about mental toughness, saying that resilience and the ability to maintain a positive mental attitude was crucial to their eventual success.
Chapter 11: Check In with Yourself Regularly

If you were a company CEO, would you check your progress every ten years? If you were a marathon runner, would you check your progress once a year? If you were an avid football fan, would you wait to see the final standings of your favorite team until the end of the season? Of course not, and you should not do that with your life.

This is tricky because we tend to lose vigilance when things are going well. One night my wife and I were driving home from an event, and I had enjoyed it so much that I wanted to revel in the moment. However, I forgot to check my gasoline level and we ran out. Part of the reason we have gauges in our cars, and in our lives, is to help us get feedback that enables us to make decisions about the future.

Take Stock at Least Annually

Some members of our fulfilled panel said they take stock of their lives as often as quarterly. An annual review may be sufficient for many people. But you should be tracking your success drivers and fulfillment plan even more often. One important caution: be honest with yourself in the assessments. If you don’t, you are only fooling yourself.

I find it helpful to use a sheet of paper or a spreadsheet and create two columns. On the left, I list what is helping me become fulfilled on my life path, and on the right, what is not fulfilling me at this time. It is a simple but powerful way to get a quick feel for where I am.

The second thing I do is create another list of all the things I spend time on (within reason) on a different sheet of paper or spreadsheet. Then, next to each one I mark whether I wish I were spending more or less time on this activity—a measure of enjoyment or fulfillment at the moment.

Lastly, I create a column that I simply check as to whether each activity is related to the drivers of my life goals or not. Not everything we do every day is directly tied to our drivers. We must do things that are asked or required of
us by others (babysitting for a friend), by organizations we work with (creating a presentation on short notice), or by the government (waiting in line to get your driver’s license renewed).

Two tools which we have used in our fulfillment workshops have greatly helped participants to identify and track their time:

- Tool 1: What is the percentage of your time that is devoted to drivers of your life goals? If your time is mostly spent on activities that are not leading to fulfillment, then take stock and think about changes you can make. I tweak my balance of time and activities based on this feedback—sometimes a small amount and other times a great deal.

- Tool 2: How has your balance changed over time? This, of course, requires keeping your assessments from earlier times. I have found this absolutely fascinating because activities, commitments, and direction keep changing throughout our lives. Some of the changes we might expect based on our plans, but other things creep in over time that squeeze out important, long-range priorities that will bring us fulfillment. Each of us has approximately 34 million minutes to shape our lives and our fulfillment. If we are controlling our own fulfillment, we need to ensure that the gusto is not squeezed out by activity creep—activities that begin eating up more and more time but are not adding to our overall value as persons.

Take stock of yourself regularly. You are your own pilot through life and you need good feedback about how well your journey is going.
Part V: The Role of Human Resources in Fulfillment

We know that work plays a major role in fulfillment for most people. Yet only 20 percent have found high fulfillment. Our surveys and other measures of engagement and culture in organizations indicate that there are some cultures that spawn higher fulfillment than others. These cultures offer more rewarding employee experiences, thereby increasing engagement, performance, and fulfillment. Based on what we have learned about what separates high and low fulfillment, it’s clear that HR has an opportunity to play a major role in helping both employees and organizations achieve new heights of fulfillment and performance—a true win-win.

Performance and fulfillment are not trade-offs. They are sapping resources from one another. Some simplistically think that fulfillment means just giving things away to employees—time and money—or giving up productivity. This is wrong-headed because creating fulfilling environments does not sacrifice performance, quality, or profit. If executives don’t believe that fulfilled employees will accelerate organizational performance, they will not support efforts to do so. They will see such efforts as needless costs or time spent.

In my interviews with senior leaders, they tell me that people issues are typically the first or second reason why they lose sleep at night—specifically the inability to find or retain the right talent, having a productive culture, developing future leaders, and creating a highly cooperative environment across and within teams. These concerns are voiced by top leaders from Fortune 500 and small- and medium-business owners alike. Association and not-for-profit directors lament similar things. They often wonder why engagement scores are not higher, why customers are not as delighted as they could be, and why projects take so long to reach the finish line. In this context, HR has a huge strategic opportunity to help attract better talent, keep it longer, and increase performance.

Another mistake is throwing things at employees to make them more engaged or fulfilled. While perks such as shopping or cleaning services, pet paternity leave, and free lunches are interesting symbols of caring, they are
meaningless if they do not help the employees become more fulfilled at work. The more work is just for a paycheck, the more time managers will spend “policing” people to make sure they are productive, greeting customers with a smile, or playing nice with their peers.

Instead, the most fulfilling environments we have investigated are doing three things right:

- **Alignment.** They are hiring aligned people and working continuously to keep them aligned with the vision, values, and goals of the organization and their department. This means a compelling vision and understandable goals with clear work stream priorities—often a significant gap in many companies we survey. A major objective of onboarding, acculturation, and performance management should be aligning organizational and personal short- or long-term goals. Sadly, most performance management processes we have audited are not doing that.

- **Capabilities Growth.** Unless people are growing, they are stagnating. Over 90 percent of people I interview want to grow, but many end up channeling their energy into non-work pursuits because they don’t feel they have an opportunity at work. In cultures with a philosophy of hiring people who already have the skills to hit the ground running, they often forget to help that talent grow further over time. Most organizations today dangle growth when trying to attract new talent. But over time, growth tends to slow down or stop in many cases. Employees who grow and become more skilled are more valuable. Their knowledge is a competitive advantage to the organization.

- **Engagement Opportunities—Outlets for Passion.** When first hired, employees are close to 100 percent engaged. They are excited about the new organization, new job, new boss and peers, and the prospect of that organization helping them to achieve their broader career and life goals. But over time, unless nurtured, engagement drops. Does it have to? The key is understanding the unique drivers of engagement for different employees and helping to fuel those drivers with engaging moments. This requires understanding their uniqueness and responding to it in appropriate ways. Some teams love pizza nights, while others would
rather be home with family and celebrate a different way—such as loopy lunches, dress-up days, kids-at-work days, and adult show-and-tells or fairs.

The key is combining a variety of actions at work to support Alignment, Capabilities, and Engagement. For those organizations that can do this, they experience lower turnover than their industry, higher customer satisfaction, more consistent quality, and higher productivity.

The Case for Fulfillment

Whether building a new organization, restructuring one, or doing a makeover of a legacy organization, it is possible for HR to take the lead in building a winning culture—one that creates compelling employee experiences and brings fulfillment to the largest number of employees in the organization. The first key step is setting up the business case, linking fulfillment to business results. Here are a few areas that can help to make the case:

Retention

As the talent market has become more competitive, organizations that can keep talent without paying through the roof will reduce costs, retain long-acquired knowledge, and increase continuity with customers. The goal is predictable talent, not a revolving door. Many studies have shown that Capabilities and Engagement—two key drivers of fulfillment—are related to retention. Rarely is pay the determining factor—if people want to leave for two cents more across the street, they are not really engaged. But they may leave for such an organization if it enables them to grow more and have higher fulfillment.

Stress and Imbalance Cost a Lot

The research is overwhelming that stress and burnout kill—literally. Over time, too much continuous stress leads to headaches, constant irritability, alcoholism and drug use, chronic fatigue syndrome, auto-immune diseases, depression, or suicide. The problem is that stress does not always wave a gigantic red flag. It is insidious and creeps up gradually until one day, people are arguing and in conflict rather than cooperating or switching into
performance autopilot and defending the old ways of doing things. Stressed people eschew innovation, take more sick or personal days, or are snapping at internal or external customers. They don’t want to, but the stress is talking. One study recently identified that an average of 12.4 days of productivity are lost per employee per year due to stress.\textsuperscript{1} It’s harmful at work, and it certainly reduces the level of fulfillment in one’s life.

One form of stress we find reported in our engagement and fulfillment workshops arises when work is pitted against the family or when work chokes off important non-work activities, commitments, and goals. Some organizations, such as Johnson & Johnson with its Human Performance Institute, have attacked this proactively, engaging leaders and employees in health and wellness, building resilience, active mentoring, and a variety of other activities. While a firm the size of Johnson & Johnson has the budgets to do this, HR in almost any sized organization can scale activities to match the firm size and culture, which I will return to later.

**Leader Pipeline**

Recent interviews with C-suite executives, HR leaders, and middle managers report an increasing challenge of finding future leaders. Some younger workers would prefer not to have the hassle, extra hours, and stress in their lifestyles. One woman told me recently, “The extra pay is not worth the headaches and sacrifices my family would have to make.” Others simply describe those roles as unfulfilling.

On the other hand, some of the most fulfilled leaders I have interviewed have been able to create a balanced portfolio of personal and professional activities, even when those activities are more intertwined than ever before. Some completely love the excitement of the work, their roles in leading others, and the game of business, but most have found additional outlets to balance family, friends, and outside interests.

**Hiring and Employer Brand**

A relative of mine said he was looking for a job in a professional services firm in the Midwest. I asked him if he had inquired at a particular company. He said, “Are you kidding? Look at the Glassdoor comments, and a friend in my network said it was a sweatshop.” He knew someone who had worked
there and reported that there was no growth, long work hours, little
flexibility, and zero fun. I was taken aback because I knew the organization
was looking for talent and having a tough time. Reputation in the talent
market is crucial. If current and former employees put out the word that this
place offers rotten employee experiences, their talent pool shrinks, leaving
them to pick weaker candidates who have few options.

Attracting talent begins with your employer brand, which should be built to
attract, grow, and retain talent. That is dependent on a culture that offers great
employee experiences, leading to fulfillment. Underlying the employer brand
is a Talent Value Proposition (TVP) that addresses what the organization and
employee can expect of each other. This value proposition is core to
fulfillment and long-term health and happiness. When it is violated by
unworkable hours or stress, contradictory values, or overbearing bosses, then
everyone loses. Hard work is always expected, but “how” work is done is
crucial to fulfillment. Is there flexibility of schedules, work styles, or
communications? Is there an opportunity to leverage passions? Is the work
individual or team-driven? All of these elements affect how good the fit is,
and how fulfilled an employee will be.

**HR Actions You Can Take Now**

HR and business leaders must embrace, address, and leverage fulfillment if
they are to compete effectively for talent today. Here are several strategies
that will get the ball rolling:

1. **Develop leaders who are talent chefs.** The best chefs can take a mixed
bag of ingredients—protein, carbs, greens, herbs—and prepare a
wonderful meal. Weaker chefs need a recipe they can follow by rote. In
a fast-food chain where turnover is often 100 percent, managers who are
the best talent chefs are achieving rates below 60 percent while rote-
managers often exceed 130 percent—a huge difference to the bottom
line. When we studied a group of these high- and low-performing
managers, we discovered that higher-performing managers have a
deeper understanding of their people that extends beyond the workplace.

   Managers who have the same distribution of talent as their peers—
people who are responsible for childcare or elder care, educational demands, illnesses, growing families, and outside passions—put together teams in ways that accommodate individual differences while simultaneously hitting corporate performance targets. To do so requires knowing who is going to school on Tuesdays, who has kids to pick up at daycare, or who has parental responsibilities. By working with their teams to integrate individual and organizational needs, they achieved far higher levels of Alignment, Capabilities, and Engagement than their one-size-fits-all counterparts—the types who say “no one gets Mondays or afternoons off” or “no exceptions to our rules,” assuming that employees are duplicate copies rather than embracing their diversity.

It’s time for HR to retool leader competencies to enable managers to become great talent chefs. Managing talent to achieve organizational goals means understanding why individuals are there, what their dreams are, and mentoring and coaching them in a way that provides the best person-organization fit.

**Action:** Take a look at your leader development competencies and programs to see if they are adequately increasing such skills. While 15 percent of your leaders get this de facto, others need the skills training to practice those winning behaviors. One element missing today in so many training programs is role-playing. Years ago, we worked with Johnson & Johnson on their famous Credo, including helping managers to use their team’s Credo Survey results to engage their teams in deeper ways. When we introduced role-playing, the results were amazing. Even managers who were shy or frightened of role-playing discussion sessions soon got into the spirit of it and many of them became quite good in their subsequent meetings and coaching sessions.

2. **Empower and equip employees to become more resilient.** It’s clear from our research that employees need additional skills and support to flourish in today’s high-paced, high-demand environment. While they seek environments that match their values and purpose, they also need to perform at ever-increasing levels. Skills such as resilience, agility, work-life integration, and health and energy management are important in a more empowered work environment, and we have also found these are
key to fulfillment.

Here’s the additional rub. It is easy to point to the 10 to 15 percent who say, “I am desperately treading water, if you really want to know,” a comment from one of our interviewees that reflected many more. However, far more employees are in the boiled frog situation, where they may only be soft boiled, but are weakening (and often denying it). One of my interviewees on a drug development team told me, “I just look around at associates in my group and see the tension, frustration, and in some cases pain. I knew these people when we started the team, and today they are working so hard to meet deadlines that they often don’t stop to look at the big picture.” She went on to articulate that they have had more and more quality glitches, reworks, or rejected deliverables, saying, “Somehow we always find time to do it again rather than stopping to think and do it right the first time.”

**Action:** Organizations today can accelerate learning and adoption of more effective behaviors through a variety of educational tools—fulfillment workshops, accelerated and tailored learning platforms, and coaching—that will enable employees to become stronger, more agile, and able to grow their value. In resilience workshops we have conducted, we discovered that C-suite and entry-level employees alike can, in a short time, learn to create plans to leverage energy and begin new resilience regimens.

For example, a key to energy management is to have energy builders to compensate for energy depleters. Burnout occurs when energy cannot be sufficiently replenished. The first step is helping employees discover that “Wow, I can manage my energy better.” Second, trying out ways to balance energy such as working out in the morning instead of at night, or reading something totally off-work before going to sleep at night, or ending the day with an “I Accomplished This Today” list and not simply an “I Didn’t Get This Done Today” list. A big part of success is reframing our mental states.

A key is allowing time for people to pause and think intentionally and enabling employees to help shape their work environments to create
better win-win outcomes.

3. **Realignment.** How many of your millennials are still seeking the same thing they did when they joined the firm? Let’s face it, our twenties and even early thirties are still big reforming periods. But reforming is not limited to early-stage workers. While such change is slower for forty-, fifty-, or sixty-somethings, many that I interviewed for our research said, “I am still trying to figure out what I want to be when I grow up.” While often said in a joking fashion, most went on to describe the need for new stimulation, new experiences, or something different, if for no other reason than the “old” has become stale.

In our fulfillment workshops, we spend time on reaffirming values, life and career goals, and the link to current work. While you might think that this drives people out the door in droves, it does not. A few individuals here and there realize that they are depressed, cynical, or disengaged because they are in the wrong place or doing the wrong thing, but most recognize that there are exciting aspects of what they and the organization are doing. However, there are factors that create misalignments within their organizational lives or across their personal lives. And, many do not feel empowered to be proactive to improve the situation.

For example, after a death in the family, one recent middle manager was demoralized, essentially going in circles, if going at all. But upon reexamination of her values and life goals, she recognized that she could retrack her life in her current organization in a new way, and in a way that would be aligned with her non-work life. She suddenly was focused and energized, and her boss started remarking that she was “highly productive.” The key is to take time to reexamine values and life and career goals, and reset how you spend time at work and home, which work projects are truly most important, and what other resources you can command to help achieve your goals.

**Action:** In fulfillment workshops conducted by the Metrus Group and other organizations, managers and non-managerial employees alike can become more intentional, and better leverage time, activities, and priorities. HR can play an important role through effective mentoring.
programs and ensuring that coaches—internal or external—are equipped to help their clients across personal and organizational boundaries. Do your performance management processes and training sessions encourage discussions about time, priorities, and career aspirations? To ensure that such discussions are happening, think about using Pulse Surveys to track how discussions are helping people to become more productive and fulfilled. While it is nice for managers to complete performance management paperwork, what is far more important is that they are having meaningful conversations. For more on performance management, see my excerpted chapter from the ATD Talent Management Handbook. 3

4. **Self-engagement.** Think back to your conversation with a manager or HR employee who hired you and how exciting it was to think about going to work for this organization. We have all had that experience. I remember coming home from one such interview and saying to my wife, “We are going out tonight and having a feast!” which was something we rarely did back then because of the cost. Now, think about employees who, over time, begin to drift into autopilot, often cruising or running along on a treadmill that has sped up, but they haven’t stepped away for even a moment to question if they are engaging with work or the organization in the right way.

Most employees don’t think about self-engagement, or answer the question, “What can I do to make myself more engaged?” Our meager efforts at preaching and at teaching managers to engage their employees better are often a one-way street. Overall, engagement scores have not increased across industries in the past twenty years. 4 The Metrus Institute research database demonstrates that a large majority of employees are not disengaged, but only partially engaged for a variety of reasons. But *self-engagement is rarely treated.* When I have challenged employees about what they are doing to increase their engagement, I often get blank stares for a few moments. We have taught people that this is something the organization does to them, rather than what they do for themselves. That is, we have disempowered them to be proactive in their own engagement, as if this is a final state. Often, the final state is a departure to another organization.
An enormous amount of research on happiness suggests that most people can control over 60 percent of their happiness. We find the same result for engagement. When we engage employees and managers in conversations about engagement, we find employees (when trained to think about it) can come up with numerous actions that would increase their engagement; some totally within their control and others that require discussion with a manager, peers, or another group. Other ideas can be developed in a joint conversation with a coach or mentor.

**Action:** *HR can be a facilitator of resources and actions such as self-engagement training, fulfillment workshops or experiences, crucial conversations training, performance management protocols that steer such conversations, self-help resource material, and measurement feedback on levels of engagement. You might consider building in such expectations during onboarding.*

5. **Measure the whole employee—engagement alone is not enough.** Traditional approaches to engagement have often taken a “company” perspective of what can be done “to” engage the employee. In contrast, *fulfillment is done “with” the employee, and for the benefit of both the employee and the company.* It’s time to move beyond today’s standard measures of engagement. Such measures are often too simplistic and not designed for self-improvement, coaching, or mentoring.

Next, do employees have a sense of where they personally stand in engagement or other related factors to fulfillment, such as alignment or capabilities? One of the problems of traditional survey approaches is that they are not designed to provide individual feedback. At best, we hope that managers who have low-scoring units will engage their teams in a conversation to make improvements that will help the entire unit, and *which may or may not help a particular employee since many engagement issues are personal.*

To overcome this, we launched a self-assessment this past year that includes the primary drivers of fulfillment and performance, because we recognized that without feedback, it is impossible for someone to take
action to improve the situation. The self-assessment has instantaneous feedback on the profile, showing high and low areas and allowing respondents to take immediate action, which is typically not available from most employee engagement surveys. While strong managers can explore overall low-engagement scores with their teams, they cannot—without violating confidentiality—engage individuals in a self-examination of engagement or other items measured on typical employee surveys.

**Action:** Look at your current employee survey measures or other metrics that you track. Are they the right ones to help determine if work in your organization is creating fulfillment? Look for items on stress, work-life integration, resilience, and personal goals. If those items are receiving low scores, it is unlikely engagement or fulfillment will rise. Second, make it a priority to deploy measures that provide personal feedback that enables employees to make improvements to their self-engagement or other drivers of fulfillment and performance.

6. **Know thyself—what drives your fulfillment?** One of the most effective actions is to understand what creates fulfillment in your life. Self-awareness is a leadership trait called out by leadership gurus. When leaders understand fulfillment and its relationship with work in their own lives, they are better equipped to discuss and connect organizational goals, roles, and skills in the context of fulfillment with others. And this requires reflective time and resources—articles, books, workshops, and coaching—that HR is in a perfect position to support.

**Actions.** HR professionals are often the shoemaker’s children, giving time, energy, and resources to others while neglecting themselves and, in this case, their own fulfillment. Some of the HR groups that we have put through our fulfillment workshops are the most stressed teams we see, often with heavy workloads, attempting to “do it all” for stakeholders, without sufficient prioritization and resilience skills to stay strong and agile. Many are in one of the stages of burnout, but often don’t recognize it until a physical or mental issue hits them, or the family’s ability to function well diminishes over time.

*Take time now to examine your fulfillment and begin a process for*
recharge and renewal. HRCI has helped to underwrite this project, and if you would like to take our fulfillment self-assessment, you can use coupon code **Fulfill1819** for 50 percent off the normal price. See Appendix A for a more detailed look at the self-assessment and feedback participants can receive.

**Putting It All Together**

Fulfillment offers a new approach to building stronger and healthier employee experiences. The organization cannot thrive while its people are leading unbalanced or misaligned lives or lack sufficient capabilities to weather continual change and higher demands. Similarly, individuals cannot thrive without a meaningful place to add value and grow. Fulfillment offers a framework to align priorities within and between work, home, and life. Winning organizations today are thinking more holistically about their people and providing the support systems that bring out the best that people have to offer by connecting the work experience with the path to fulfillment.

I want to return to the story I opened with because it brings together much of what we have shared throughout this book. If you remember Marisa, who faced stage 4 pancreatic cancer, you will recall that I had been working with her firm to help transform its culture. At that time, we were using a strategic scorecarding process to help align people behind a new vision. The strategic scorecarding process helped leaders translate their business vision and strategy into measures that captured the most important success drivers—people, customers, suppliers, community, shareholders, and operations. More importantly, it was balanced. It didn’t sacrifice people for shareholders, or vice versa. It wasn’t all operations with no focus on suppliers or customers.

But it didn’t stop there. The formula for successful change was getting the rest of the organization to understand those measures (Why are we measuring this? What is the strategy? What does it mean to me?) so they could best support the strategy and direction. That process helped create a huge change in their organizations by dramatically increasing employee engagement, reducing service times, halving client defections, and creating great financial results.
Part of the reason Marisa and others were so successful in the personal and business turnaround was alignment—they were riveted on clear goals and rowing in the same direction. Second, they identified the critical few success drivers—whether organizational or personal—and targeted scarce resources of time, energy, and money to improve the “right” capabilities they needed to reach their goals. Lastly, the scorecarding process tapped into people’s passions to win. Not only were many excited about the new direction and working in a place in which peers and other departments were aligned, but many saw a change in impact from working hard and not seeing the impact, to working smart and understanding how they created success. Also, many began to see new personal opportunities to grow, higher job security, and were active participants in the turnaround process—they were helping to bake the cake.

When I began this book, I said that there is no such thing as a perfect ability to predict success or fulfillment, but that you can stack the odds in your favor. That is exactly what Marisa and her organization did. They increased the odds by focusing on alignment with their vision, building great capabilities, and engaging everyone in the process. Now it’s your turn to apply these principles to your own success, and your organization’s success.
SEND US YOUR OWN STORY

We would love to hear from readers with your own stories of goal-setting, overcoming obstacles, personal achievement, and the road to fulfillment that you are following—or have followed—in your own life. Please contact the author at: www.wschiemann.com/fulfilled.

If you are looking for more depth, I recommend the companion book on fulfillment that includes additional stories, more details on creating life plans, examples of successful life maps and goals, and behind-the-scenes stories of well-known athletes, astronauts, and public leaders. It provides additional tools to map your own life fulfillment, shows how to measure your fulfillment, and create a plan that you can track over your lifetime.

Also, you can take a fulfillment self-assessment that will provide instant feedback on how you stand on stress, work-life balance, alignment, health, learning, risk-taking, and other factors that drive fulfillment, along with recommendations based on your unique profile. See Appendix A for a more detailed look at the feedback participants can receive. To access the self-assessment please go to https://metrus.com/fulfillment-survey.

Lastly, if you are looking for a way to engage leaders, employees, or colleagues in your organization, we have developed workshops, webinars, and executive briefings that help teams become self-aware, find alignment between work and non-work, increase resilience, rebalance time, find energy chargers, and increase performance. These workshops are outstanding for retaining valuable resources through team development and norming, retracking employees who have drifted in recent years, and enlivening millennials and other employees to reinvest in their careers with your organization. We also have versions for high-potential groups such as fast-track women or minorities. For more information, go to metrus.com/beyond-engagement-workshop or contact info@metrus.com.

\[ii\] The Johnson & Johnson Credo Survey was their “engagement” survey, measuring important elements of the Johnson & Johnson Credo—a set of values and behaviors that describe what they believe in.
Acknowledgments

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Danielle Novotny has been my trusted and competent right arm throughout this and other projects on fulfillment, and I thank her from the bottom of my heart. Finally, thanks to Valeria for her unwavering belief in me and this work in our pursuit of making workplaces, and life itself, more fulfilling.
Appendix A

Fulfillment Self-Assessment: Know How to Increase Your Fulfillment

Research shows that we can control much of our fulfillment. But to do so, it is important to assess where you are today and identify the biggest opportunities to become more fulfilled. Metrus has identified three large factors that influence your fulfillment:

• Alignment across work, home, and life
• Capabilities to succeed
• Engagement or energy you bring to different aspects of your life

These Big Three factors, often abbreviated as ACE, are influenced by activities you do every day that fall into 12 Drivers of Fulfillment, which are listed below. Full descriptions can be found in *Fulfilled! Critical Choices: Work, Home, Life*.

1. Values
2. Vision and Purpose
3. Life Plan
4. Passion
5. Relationships and Support Net
6. Balance
7. Nurturing Your Body/Health
8. Stress
9. Resilience
10. Continuous Learning
11. Risk-taking
12. Giving Back
Each individual has a unique profile on the 12 Drivers and ACE. Scores can range from 0 to 100 with higher scores indicating greater strength and lower scores indicating areas of opportunity to increase performance, success, and fulfillment. Below is an example that provides a sample of feedback recommendations for an individual who has low scores on several fulfillment drivers. For more information or to access the Metrus Fulfillment Self-Assessment, go to [https://metrus.com/fulfillment-survey](https://metrus.com/fulfillment-survey). It is available at a discounted rate for a limited time for readers of this HRCI-sponsored book using the code Fulfill1819.

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**Feedback Example**

Below is a partial sample of individual feedback from the Fulfillment Self-Assessment.

Vision/Purpose (Score = 55)

- Do you have a vision for your career and non-work life? It is difficult to feel a sense of purpose without giving some thought to where you want to go in life. What would you like to accomplish in your lifetime? What would others say about you at the end of your life? These questions will help you think about your vision and purpose more deeply. Take enough quiet time to reflect on what your vision is, and then write it down. You can adapt it over time, but establishing what you would like to achieve in your life right now will help you shape your actions for weeks and months to come. Additional exercises, ideas, and supporting material can be found at [www.wschiemann.com](http://www.wschiemann.com).

Balance (Score = 30)

- Balance is a huge factor leading to life fulfillment. If you’re not feeling balanced, chances are your stress is high and you may not be feeling as productive as you’d like. Track the time you spend at work or on work-related activities, and track the time
you spend in your non-work life—this is usually best done when looking at your time in a typical week. Review how much time you currently spend on work and non-work activities, and then make adjustments for how much time you would like to spend in those areas instead. Keeping those adjustments in mind, tackle your next week conscious of how much time you would like to spend on work and non-work activities.

Stress (Score = 25)

- A certain amount of stress is good, researchers tell us—it gets us going and revved up, often allowing us to accomplish new or more things. But we need to monitor the level of stress to ensure we do not trigger the negatives at higher levels such as eating more, obsessive behaviors, headaches and other physical maladies, degeneration of relationships, and so forth. One thing that helps in most cases, unless it is a crisis requiring immediate action (e.g., a family member in need of urgent care) is taking small timeouts—moments to clear your head, think about what is causing stress, how you perceive the stressor, and how you want to react—and adjusting your future behaviors.

Relationships / Support Net (Score = 50)

- Advisors, mentors, and coaches are known for their experience. If you need a seasoned supporter, find mentors and coaches who can best help you. Reach out to individuals in your organization with more experience, or reach out on platforms such as LinkedIn to find an advisor, mentor, or coach who is right for you. Some of the most fulfilled people in our studies said they have two, three, or four mentors—perhaps one for work, one for health, and one for relationships.

Continuous Learning (Score = 60)

- If your organization offers development opportunities, are you taking advantage of them? It’s important to make time for personal development so that you can feel more accomplished and confident in pursuing your goals. See if your organization
offers classes or groups for development opportunities, and pursue what interests you the most and will be most aligned with your goals. If your organization doesn’t have many development opportunities, talk to your manager or start a group where you can take charge of developing in ways that inspire you (and others) and steer you to your career and life goals.

Resilience (Score = 45)

- Consider taking modest risks that might not be guaranteed to succeed. Small failures are great tools because they will provide learning and development of resilience skills. You may not want to take these trial risks in a critical environment such as work or home, but you can experiment with a hobby. For example, if you take up piano alone, you may have setbacks at various stages, but with a piano teacher you learn to overcome them; or if you join a sports club and take up a competitive activity such as tennis or racquetball, you will begin to cope with wins and losses, which helps you physically and emotionally. By practicing some risky steps in a non-threatening area, and succeeding, you will feel more confident in taking bigger risks in the pursuit of your bigger goals.
NOTES

Preface


Introduction


4. For more information, see the “Authentic Happiness” website at https://www.authentichappiness.sas.upenn.edu/.

Chapter 2


Chapter 4


Chapter 5


Chapter 6


Chapter 8


Chapter 9


Chapter 10


Part V


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Dr. Schiemann is a frequent global keynote speaker and workshop facilitator for many public and private forums around the globe. He is a Fellow and Scholar of the Society for Industrial and Organizational Psychology (SIOP). Bill received a PhD in Organizational Psychology from the University of Illinois. Follow Bill on Twitter (@Wschiemann) and on LinkedIn.