

# EP 93 - Lori Michele Leavitt: An Organization's Path to Aligned Momentum and Clarity

**Mitch Simon:** Welcome to another episode of Team Anywhere where CEOs, leaders, and experts at building teams,

**Ginny Bianco-Mathis:** companies,

**Mitch Simon:** organizations,

**Ginny Bianco-Mathis:** and amazing cultures share how to lead from anywhere in the world. I'm your co-host on the East Coast, Ginny Bianco-Mathis.

**Mitch Simon:** And I'm your co-host on the West Coast, Mitch Simon. And we invite you to join us to Team Anywhere.

In today's organizations, worker's desire require clear goals that are connected to their passion. Leaders must help team members become so clear about a vision that it raises the hair on their arms. Staying on track to achieve these goals requires inspiration, motivation, ambition, and of course momentum.

Today's guest, Lori Michele Leavitt, also known as The Pivot Catalyst, provides leadership and software solutions to build and maintain momentum, to keep teams on plan. With her direction and inspiration, she teaches teams how to move forward, test their measures in 90-day intervals, deal with any unsurfaced resistance, and gracefully pivot toward the next best steps as they Team Anywhere.

Hello, and welcome to another episode of Team Anywhere. I'm your co-host Mitch Simon on the West Coast here in San Diego. And on the East Coast in Virginia is my amazing co-host, Dr. Virginia Bianco-Mathis. And you have an incredible guest to bring to the show today. Can you please introduce our guest?

**Ginny Bianco-Mathis:** Today we have Lori Michele Leavitt. Lori is the Founder and President of Abridge Corporation. Her leadership services are delivered through business and performance coaching, leading peer groups, and consulting for M&A due diligence and turnarounds. Very impressive. And Lori has a wonderful book, The Pivot: Orchestrating Extraordinary Business

Momentum. And in there she presents an effective methodology for anyone aspiring to be a powerful leader especially during these times of upheaval and a new global economic reality.

And fortunately for us, she has a second book coming out, Pivot to Clarity which we all want to hear about and we will make sure that happens. So thus, I would like to introduce The Pivot Catalyst herself, Lori Mitchell. Love it.

**Mitch Simon:** Lori Michele. It's Lori Michele, right?

**Lori Michele Leavitt:** It is Lori Michele, yes.

**Ginny Bianco-Mathis:** Thanks, Mitch. Alright, welcome.

**Lori Michele Leavitt:** Thank you. Lovely to be here.

**Ginny Bianco-Mathis:** Well, let me begin by asking you what have you learned over this past two years given these times?

**Lori Michele Leavitt:** Well, you know, I'll split this into personal and professional although in my life, they go together. And what happened has gone together.

So, personally one thing that really grew in me. I'm not saying it's a change or necessarily a pivot but it is empathy and patience. Because I had to have it. I was forced into it and it's not until you're forced to say, do I have enough of this to really say, wow, I think I'm going to need to improve.

And what I found professionally, is that my team actually did better. So, me having those strengths led to the team, being more engaged, feeling more empowered, and staying out of overwhelm, I would hope. So, personally and professionally those really helped. Of course, professionally, we also had to change how we did things.

And so, I run a virtual team. So, doing that remotely is not a problem. Clients, I typically meet with live as well as sometimes remotely. But I lead live all-day meetings and those had to go online. So, what changed and this changed in my team as well. A lot more daily huddles and fewer to no long operational meetings.

Just kill them. They're draining.

**Ginny Bianco-Mathis:** Yeah. Big lesson. And yet there are still folks who are still trying to put those back in, aren't they?

**Lori Michele Leavitt:** People will do that. I mean, people will do what you expect. So, there is overwhelm because people are trying so hard. But if you really sit back and go imply, how's my energy doing when I'm in a remote meeting and it's usually not very high as a facilitator myself, I have to really work it. How do I keep the energy high? And one of the ways is to make a brisker meeting that's shorter.

**Ginny Bianco-Mathis:** Love it. Well, let's get into, *The Pivot*. It has gotten some incredible reviews. And you have something in there called the aligned momentum. Can you share what does that mean? You know, what are the three key pillars of that?

**Lori Michele Leavitt:** Sure. And thank you for noticing the reviews. I'm lucky enough to have many guides myself. And they're just such wonderful models of aligned momentum or guiding other leaders in it. So, aligned momentum as I was writing *The Pivot*, which in my definition is many shifts by many people over time and the leader is orchestrating that.

So, it is not one of the reasons I wrote that book back in 2017— which of course I started well before 2017. Before we were using *The Pivot* so often— it really is not a quick turn. Maybe in a new startup when there's 1, 2, 3 people everybody's on the same page. But if you're an organization, your pivot, even if you have a quick one, like some did during the pandemic of what they were going to produce for example. It's not sustainable unless you do these things in your workplace.

And so I came up— I'm a measurement person. And so, I said, all right, so I'm going to talk about this orchestrated change. How on earth are organizations going to measure it? How do I measure it when I go into an organization? What am I looking for? And I realize that there are three key indicators. So that's probably the best way to describe it.

And I'll first say what that destination is when you're in a state of aligned momentum, your organization, everyone is clear about where you're headed. They're committed to that. They share commitment. You're working together toward that better future. And that is when you can experience breakthrough performance.

And so the aligned momentum key indicators there are three that indicate that you are ready for brilliant execution. And there are three that indicate that you are moving toward a better future. And the first three are clarity, mastery mindsets, and nimble decision-making. And the last three are strategic-thinking, talent adaptability, and coaching.

**Ginny Bianco-Mathis:** And so, you're saying, you need to put in infrastructures to then make those happen and then those also become your measures.

**Lori Michele Leavitt:** Yes. And I use the word orchestrating because this is not a one-and-done project. This is the leader's role to continuously orchestrate having these indicators in their business because change happens all the time. You want everyone in your organization to be able to change. To have change as being natural way of working there.

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** It's not a push. It's just part of what people do.

**Ginny Bianco-Mathis:** So, share with me a leader is chatting with you and oh, I heard you've done great things. I wanted to put these six things in action. What do you do? How do you help that leader make that happen with his team or her team, especially it being virtual?

**Lori Michele Leavitt:** Well, the first thing we do is work with the leadership team to know where they are in this journey. Even the best leaders know that when a certain future requirement, they may be at the very start. And so, I'll just describe quickly what The Pivot Diagram looks like. The stages of it.

So, the very first stage is the start. And the start is that you have your organization people trust each other. There's empowerment. Those shared values. That foundational stuff. That if you don't have those in place, you can tell people what you want or give them a RARA meeting. But nothing is going to land because that is not in place. If that's where you are, that's where you start. There's no benefit to you to starting down the road at a different stage.

The next stage is clarity. And clarity to me is both getting clear. So, a leader really needs to take the time and get others on the leadership team. The time to go into deep thought, to truly get clear. And when I say truly get clear, I mean that kind of clear that makes the hair rise up on your arms. That yes. That this is where we're going. Not the, this is what our competitors are doing. So, let's copy it. This is what we want. This is the direction we're heading.

**Ginny Bianco-Mathis:** How do you push a team or inspire a team to get to that kind of clarity?

**Lori Michele Leavitt:** And so, first you got to get clear for you. So, if you are not inspired, then they won't be inspired. Some get to that point of being inspired themselves. They get clear and then stop. They're not sharing that level of clarity.

They're maybe spoon-feeding, commanding, expecting people to read their minds. Or maybe they've said it once. Or maybe my favorite one is that they've translated all this into a budget. Everybody only sees a budget and somehow, they think that's inspiring. No. No one does have been hired by a budget.

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** The stage after that, I call nimble and focused. So, there are many companies who stay in that focus mode that operational mode. And when you're always in that mode, it's really hard for change. That's when you drum up the fears of being blamed, the fears of conflict. All those fears come up even though you haven't intended it to. Because you've had such an emphasis on doing something a certain way, the experts.

And so I say focused and nimble because when you can be so clear that people are clear also about the future and they want that too for themselves. And that aligns with what you need them to do for the organization. Then, they can change.

They can be nimble. They can be thinking, all right, I did this yesterday. But as this thing I did yesterday gonna really move us toward tomorrow? Yes, or no? It only takes a second. I'm making it sound like it's hard. I mean, it only takes a second. But it takes the leader building that trust and trusting them to create the empowerment in being clear.

**Ginny Bianco-Mathis:** It's like that psychological truth that we all know that if I really want it, I will find a way. And that creates innovative thought. If you're telling me this is what you want, I'll find the obstacles. I'll be passive resistant. So yeah, turning that switch is the magic.

**Lori Michele Leavitt:** Yeah. I'm not saying that any of this is easy. And it's one of the reasons why I step in as a guide because it often takes someone from the outside to help them open their minds.

The second book, I purposely wrote with a little chaos in it. They're like, why is she telling this story? And I purposely did that because we need to disrupt how our minds work in these models and frameworks to think creatively and to be open and think about the future.

**Ginny Bianco-Mathis:** I love that. And I'm going to skip to something because I was reading it and that's when it really started clicking for me was the Alan Mulally story. And how we kept pushing and pushing in his questioning. Could you share a little bit about that? About what it takes to get to that clarity?

**Lori Michele Leavitt:** Yeah. So, my second book, I have two stories of Alan Mulally because I think he is a fabulous model of aligned momentum. The first one is about getting clear and how did he get clear from self. And was he willing to say no when it wasn't a yes.

**Ginny Bianco-Mathis:** Yes.

**Lori Michele Leavitt:** And for him, he was asked to be the CEO of Ford and of course, it was a great opportunity. But he didn't want to step in to be the leader of that. And Ford was going bankrupt. So, this was not like an easy thing. It was quite the challenge.

And he wanted to know that he truly could lead that. And so, he stepped back and asked himself and he said, why is Ford going bankrupt? And the answer was because Ford is not making cars and trucks that people want to buy. And so then, he was a no because I don't know about cars and trucks. How am I going to lead that? And then he thought further, all right, so why are they making cars and trucks that people don't want to buy? And one thought was that perhaps they're not working together. And he had assumed that they would be because when he was in charge of the Boeing 777, he followed the Ford Taurus way of working together. It was collaborative.

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** And so, he's stepped back. That just really nudged him. And he said, could it be that they're no longer worked together? And that excited him. That even what I say it. I mean, I could feel how I would feel and the hairs rise up on my arms. That was a yes to him.

**Ginny Bianco-Mathis:** 'Cause he discovered the real underlying issue at play—

**Lori Michele Leavitt:** Had to get clear about what was going to be done next? What do they need to do next?

**Ginny Bianco-Mathis:** Yes. Love it. So, I get it clear with my team with the aligned momentum. Then what? They obviously get moving just like in the Mulally story. How do you make that happen as the leader?

**Lori Michele Leavitt:** Well, I want to mention the last stage because it's important and that is context. So, what is the social and structural context within your organization? So, that's the last stage that you would look at because oftentimes what happens. I think we have a safe place. No, I think we're being clear. I think we're focused and nimble but then things still aren't happening and there's some context that's been set up in the organization that's causing too much resistance to the change.

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** And so, the context is important.

**Ginny Bianco-Mathis:** I guess you start again asking your questions about what's behind that resistance?

**Lori Michele Leavitt:** Yes. And just asking lots of questions of the organizations I'm working with and the teams, whether it's directly, or whether it's through assessments and gathering all that information can really help identify what is your priority?

Because we're all focused on just the best next step. Wanting to determine where do you want to go in the future. But then when you discover what really is in the workplace, which of course is going to change over time just like a manufacturing firm where you fix one bottleneck and there's another. That's how it works.

You're always checking to see what stage are you at in these stages. And just keep taking best next steps.

**Mitch Simon:** Can we go back a little bit to context? Can you give me some context on the context? Can you share a couple stories of when the context was off?

**Lori Michele Leavitt:** Yes. It was a small organization I worked with and it was entrepreneurial and the leader was a very personable person. So, everybody

loved him and yet it was also disruptive. And so, people weren't getting their work done and also, he didn't feel that they were understanding his direction that he wasn't able to communicate clearly. So, the structural context was such, or the first simple step was he moved his office. He moved his office so he wasn't just in the mix of things. And we don't always do that. I mean, oftentimes. The reverse is the case. You keep moving people from the 14th floor down closer to the other offices. But in this case, it benefited everybody for him to be a little further away. That's sectoral context.

The social context that we had to work on next because to help him better communicate his strategy to action through others. He chose a particular person who absolutely was capable to do it. But the others weren't willing to have her do it, if that makes sense.

**Ginny Bianco-Mathis:** Yes.

**Lori Michele Leavitt:** So, there's a social context running in that, I mean that's not what we addressed first. We addressed, what do we need to have happen? What are three things that will show us we've made progress? I would meet with people. I think it was 90 days from then. And at first, they'd be grumble, grumble, grumble. And I'd say well did this happen? Oh yeah, I Guess. Yeah, it did. And this? Oh yeah, that's a lot better. And this? Oh, yes. That's a lot better. So, all three happened then we could address the next thing that was harming progress which was the social context.

**Ginny Bianco-Mathis:** All right. So, what I hear from you— fabulous question, Mitch. Again, your guide or the six measures or some form of that. You keep going out and testing though. And when you ask people about those specifics, you are educating them to focus on those. Oh well, yeah now that you mention it that was explained and we do now have that and so forth. And I love this in tandem. The action, the educating, the following up.

**Lori Michele Leavitt:** Yes. it's so powerful. It could really benefit any size of organization. It doesn't matter if they're all live or they're remote. It will depend on based on all these things, different companies will be in different stages. We'll have a different stage to work on and a different aligned momentum key indicator that's important. And they'll have different progress measures based on what they are working on.

**Ginny Bianco-Mathis:** And you give them this tree, this model to keep them on the journey. And you're constantly collecting data to feed back into there to know the next step to tweak and [inaudible]. I love that.

**Lori Michele Leavitt:** Over time, what you'll have is you actually help create that culture that's willing to change because you've also gained momentum. Because you're teaching people that if they just give these progress measures that you put in place for those 90 days.

**Ginny Bianco-Mathis:** Yes.

**Lori Michele Leavitt:** Then what they're grumbling about will be addressed next. But you're not going to divert to that.

**Ginny Bianco-Mathis:** Love it. Yes. That is so true because I have seen many organizations get diverted. And now they're going down 10 paths. Not that one path that if we were truly have the clarity and our supporting, that could happen in 90 days.

**Lori Michele Leavitt:** Right.

**Ginny Bianco-Mathis:** Well, I'm going to move a little bit to something you say in your new book and we can see how passionate you are about clarity. And so you decided one day to wake up and I'm only going to write a book only on clarity. You say that the brain blocks clarity and how leaders make mistakes is through default, not their faults. What do you mean by that?

**Lori Michele Leavitt:** Mostly, those are called Weinstock Blind Spots. And it's hard to uncover blind spots because we don't know what we don't know. It's not impossible if you're an introspective-aware person. Even without asking for feedback, if you see a theme in your life and you realize, wait, this keeps happening to you, to me, wait. I'm in every situation, maybe it's me. And it takes—

**Ginny Bianco-Mathis:** It can't be.

**Lori Michele Leavitt:** It takes that, but it helps. And you can move through that much faster without so much pain of having that theme happened to you again and again by having the vulnerability to ask for feedback. And that I've seen in different stages where you could have a one-on-one coach.

I really like peer groups for this kind of discovery.

**Ginny Bianco-Mathis:** Yeah. I noticed that. I love that—

**Lori Michele Leavitt:** I really do. Because it's not just one person's opinion. It's truly modeling a culture that has both caring and confrontation in it.

**Ginny Bianco-Mathis:** Yes.

**Lori Michele Leavitt:** And so, we speak truth in those meetings. And we're only there to help each other succeed. Now if all organizations could be like that, great. But it's just not. There's just so many other agendas.

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** But in the workplace, there's other agendas, even with the kindest board you could have. So, having a place like that is wonderful for uncovering blind spots.

**Ginny Bianco-Mathis:** Which then leads to my last question around language and communication techniques. You spend some time in your newest book talking about different communication techniques that a leader can use to increase clarity to get to the points you're talking about. Can you share a few of those?

**Lori Michele Leavitt:** Well, sure. One is to get out of their own way. Another is to kind of listen and learn about people so that you help them get out of their own way and to put it really concisely.

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** So, how you get out of your own way is one what we just talked about. Getting over blind spots. Giving yourself time to become aware of how you are. And how you are isn't necessarily how you think you are—

**Ginny Bianco-Mathis:** That's for sure—

**Lori Michele Leavitt:** in the eyes of others.

And I give a story in the book about David Pottruck who was really a goal-getter at work. Which I resonated with that because that's how I am. And it rubbed people the wrong way.

**Ginny Bianco-Mathis:** Yep.

**Lori Michele Leavitt:** And—

**Ginny Bianco-Mathis:** You're aloof. You're alienating. I've heard it all.

**Lori Michele Leavitt:** And he went through a divorce and he thought, people just don't get me. I'm okay but everybody else doesn't get me. He went to a therapist which shows a sign of introspection, right? Hey, maybe it's me. There's that a little bit of awareness. Maybe it's me. And then he realized, and with the help from his therapist that he didn't have a wife selection problem. He had a husband behavior problem. And that's what he felt was also happening at work.

And so, he had the wherewithal to make shifts that he needed. And of course, that doesn't happen quickly either. You become aware and you give yourself the time to take the shifts you need to take and see progress all the time.

**Ginny Bianco-Mathis:** And then as all three of us know, we probably have dealt with leaders who never get there. And they have some decisions to make, right? This theme, however, is we are hearing constantly that becoming vulnerable, the self-knowledge, to have a coach, to have a therapist, to do some introspective kind of exercises is becoming more of a norm. And that is something I am thankful for this whole pandemic thing.

Final question, promise. In the work you've been doing, can you share a final story around here is a company we worked with that got it and here's the proof of that?

**Lori Michele Leavitt:** Well, I'm going to give you an example. And one thing that happens after a success is sometimes it's still reverts. If that orchestration—

**Ginny Bianco-Mathis:** Yes. You go backwards a little bit—

**Lori Michele Leavitt:** So, I'll just tell you that it had a happy ending. And then the happy ending was unwound which also happened at Ford after Mulally. And so, you know, you'd think they fit a way is ingrained and then find out it's not—

**Ginny Bianco-Mathis:** Well, people change.

**Lori Michele Leavitt:** and people change—

**Ginny Bianco-Mathis:** and an organization—

**Lori Michele Leavitt:** structure changes that's contest, right?

**Ginny Bianco-Mathis:** Right.

**Lori Michele Leavitt:** So, this case was an Indian nation, 5,000-member organization, a 700 business and government office. And the leader envisioned collaboration and they weren't collaborative. Some toxicity. There's a lot of changing in positions. A lot of desire to have positions. Wonderful people. It's just, this is what they've had in their organization. But he wanted to change things.

And so we went through, we took them through realignment. It did include both structural and social changes. And we did that with a combination of live and remote work. So, the work that we do with aligned momentum and we have software that powers us.

**Ginny Bianco-Mathis:** Oh, that's fabulous.

**Lori Michele Leavitt:** It really helps us do this. Everything that I design software-wise has always been built with anywhere in mind. You know, I saw this decades ago that we needed, whether it was machines, whether it was people, organizations, and it's also always about performance momentum. It's not about management.

So, you can find tools for project management. You can find tools to see if people are doing the actual tasks that they're supposed to be doing. That's not us. We're about alignment, momentum and vibrancy. So, we go into the organization and we worked with the leadership team, so they could really voice, what do they see in the future?

You know, they're not used to doing that because to them the future is laid out. We protect our ways and our people, that's what we do. And so, they had to think a little bit bigger in order to come up with this vision that included how they work together. And certainly, it fit with what their purpose is because their purpose had to do with serving their people and priorities were being met because of all of this stuff.

We did assessments with them to assess the teams, the team's assessment of the organization itself, the team's assessment of the team. And we came up with four measures, progress measures, just like the other example I gave. And I'll just wrap this up with a final testimonial from the chair who brought me in, said

that within six months they had made more progress and they had been working on that for six years.

**Ginny Bianco-Mathis:** I love it. I am very enthralled that you have a tool that's totally built to measure this. And it's both the human interaction piece that is making it happen along with the benchmark of how close we're getting to that goal.

Well, how do people get in touch with you? How do they get your books?

**Lori Michele Leavitt:** Well, first, Ginny and Mitch. I just want to thank you for the very insightful questions. You know, everybody wants to be noticed and understood. You both managed to do that, virtually. So, it is possible.

So, the second book is just being launched. It can be found at [pivottoclarity.com](http://pivottoclarity.com). That's a special landing page so that I can give gifts with an order. And those gifts include a five-week mini training session, videos, as well as a cool one-sheet explanation tip and a call with me. And they can find both books and actually there'll be five more books. So, covering the first book and all six of the aligned momentum key indicators.

**Ginny Bianco-Mathis:** Fabulous.

**Lori Michele Leavitt:** And so, these first two can be found at [thepivotbook.com](http://thepivotbook.com).

**Ginny Bianco-Mathis:** Excellent. And yes, you have a plan. You have an aligned plan. That's perfect. Mitch.

**Mitch Simon:** Great. Well, thank you, Lori Michele. It's been great to really dig down into clarity. So, now we're clear. I want to thank you for coming on to the show. Want to thank you, Ginny for doing a great job co-hosting today. And I wanna thank all of our listeners for tuning in, and if you've loved this episode, which we have. Please share this with your friends, your colleagues, people you work with, people who need to know, and we look forward to seeing you next time on our next episode of Team Anywhere.