

FRAUD TALK – EPISODE 95

You Can't Manage What You Aren't Aware Of

In this episode, Dr. Lisa Walker, leadership psychologist and executive coach, shares the value of practicing emotional intelligence to grow professionally, manage teams and move ahead. Also, in honor of International Women's Day on March 8, she discusses tips for women in the anti-fraud profession who are building and leading teams. Stay tuned until the very end for a special announcement from the ACFE.

Transcript

Mandy: Thank you for joining us today for Fraud Talk. This is Mandy Moody, the communications manager here at the ACFE. I am excited to be joined by Dr. Lisa Walker. Lisa, welcome.

Lisa Walker: Thank you so much, Mandy. It's lovely to be with you.

Mandy: I actually first met Dr. Walker at our offices here in Austin, I guess, a couple of years ago now. She was coming in to do some emotional intelligence training with us here, and I instantly fell in love with her message and her personality. Dr. Walker, tell us a little bit about you and what you do, and how you kind of fell into this field.

Lisa: Yes, so I'm a leadership psychologist. I'm a psychologist by training, did clinical practice for, my goodness, probably about a decade and a half, and organically transitioned into leadership development work because so many of the clients I worked with were senior leaders in organizations, who wanted my support on relationship matters in the workplace.

Initially, they came in for personal work, and it was so transformative for them that they wanted me to come into their organization to consult, to train, to coach both them as individual leaders and their teams as well. Then that took me on a journey of additional training. Did my executive leadership coach training at Columbia Business School. Then a lot of other additional training certifications to ensure that I have the most effective tools to work with my clients.

It's been an organic journey for me in a place where now I go from one organization to the next from country to country really, working with my leaders and their teams making them more effective.

Mandy: Yeah, actually when I was writing these questions, I said that you work with teams and individuals around the country, but you actually work around the world.

Lisa: I do, I do. My leaders and their teams are all over. This morning, for example, I was on a team and my folks were in Taipei and Singapore. Later on this evening, I have a team where some folks are in Australia. Others are in China, so any given day, I'm on multiple continents. The wonderful thing is we have Zoom and other remote ways to navigate. Then, of course, I travel to see these teams. Right now as we're speaking, I'm in Seattle with another team that we're doing a week of team coaching here.

Mandy: Well, and that's interesting that this training that you do does take you all over the world. I know you coach and talk about emotional intelligence and something that spans all cultures and all organizations

— although it might have its own nuances in different places — but tell the listeners a little bit about what emotional intelligence is and how you define that for people for the first time. I know something you told us and in our course was this isn't just the frou-frou feelings stuff. This is what it looks like in the workplace, and it's a powerful tool.

Lisa: Absolutely. I'll start with a quote by one of the fathers of emotional intelligence. He indicated that... Well, this is what he says. "CEOs are hired for their brilliance and they are fired for their lack of emotional intelligence." Basically, what he is saying is they may know all the technical stuff and they may be brilliant for example at the data, and perhaps even the business acumen, but if they don't know how to navigate people issues, manage conversations, manage relationships, they can actually ruin an organization, right?

Decades ago, when organizations were looking for leaders, they were searching for brilliant minds. Harvard did an amazing study some time ago, a couple of decades back now, looking at why some brilliant past students years later when you've tracked them and follow them, they're not as successful as one would have hoped. The study went on to examine these phenomena, and come to find out, the folks who are most successful, they are higher in what we now know to be emotional intelligence than in IQ.

I start with that to say it is those skills, those people skills that we have, that allows us to navigate relationships. First of all, to know ourselves well. We understand how we manage stress. We understand how to process information effectively. We understand how to communicate effectively, understand how to be flexible, to problem solve. Interestingly enough, when folks think of emotions and emotional intelligence, they do not associate them with these fundamental tasks that we have to do every day in the workplace, yet they are critical, right?

Imagine someone who isn't able to be flexible in his or her thinking. How can they accommodate ideas and opinions from others? That's part of emotional intelligence. That's why it's so critical. It is literally the key factor that separates successful individuals, both in the workplace and in life, from those who are still striving to be successful.

Mandy: That's interesting that you mentioned. It's almost two halves or two sides of a coin. Being able to do the job, like you said acumen, but also the relationship part of it and the self-awareness. Do you have an example of a time where you were working with someone where you really saw that it worked? They actually got it. Like, "Aha, I see where this was a tool and something I needed to learn and I need to change."

Lisa: Absolutely. There's so many examples that I have. I'm fortunate I get called in a lot to work with brilliant individuals. I mean they are so good at what they do from a technical perspective, and they're striving to get to the next level in the next level in their organization, but something is holding them back. When we investigate and take a closer look, it generally is that "people" side of it.

I'm thinking of an amazing leader of mine. We'll call her Sam, Samantha. Samantha is this go-getter. She's known as this person in her organization in the department in which she works, give her the hardest task and she is going to push through that wall and ensure that they're getting amazing results. The challenge is any wall that Samantha comes up against — meaning people and others — she tended to bulldoze them.

Interestingly enough, because she was rewarded for the business result year after year after year and no one was really coaching or paying a lot of attention to the damage that was being caused to personnel, she continued on that path. As she was now setting her eye on... She's thinking, "I've been in this place for such a long time. I need to be further along in the organization."

Now, she started asking questions around why she wasn't being promoted. This is when she started getting answers about well, people fall when they're around you. People who work with you report you tend to be abrasive. You tend to be highly competitive, and you don't really care much about others' feelings. When she got this feedback, it was crushing.

She was crushed, yet she's a very ambitious, hard-working person. She saw this as a challenge. There's a part of her that doubted whether or not she could learn these people skills, but then the other side of her that was so competitive made her stand up to the challenge. We were working together for almost a year and a half. We finished her work for about a year and a half ago.

To watch her grow through this process. First, she had to start with understanding who she is as a person, how she shows up. Then understanding the gaps in how she navigated relationships and what she needed to manage in order to show up differently. Samantha sort of buckled down to do this work, to develop deep self-awareness, because as I always say to my leaders, you cannot effectively manage what you're not aware of.

She had to be willing to ask and answer some really tough questions about herself. As she navigated that and she developed this deeper awareness of herself, then she could start figuring out how do I manage more effectively so I'm not bruising or hurting or damaging folks and my team in the way that I had been. As she improved in her self-management, then absolutely she started noticing additional ways in the environment how she could enhance relationship with her peers and with other stakeholders.

Part of how we set this up is that she was constantly getting feedback from others around her. She shared with them the specifics of what she was working on. She was working on being less abrasive. She was working on asking questions that were more open-ended and more inviting and inclusive. She was working on not cutting folks off in conversation. These were all things that folks reported that they couldn't stand about Samantha. They gave her feedback as they observed her over time, and even gave her suggestions on what we call feed-forward about how to continue on this path.

Here is a wonderful thing about this, Mandy. Over time Samantha became this almost example to her people of what this work can do. There were individuals that I had interviewed on her behalf who didn't trust her and they wanted her to know that because of how she treated them over time. To see her do the work, to build trust with these folks that now these are people who want to collaborate with her, who feel good about being in meetings with her.

We hear in the sales world that you buy things from people who you like and trust. Well, the same thing happens in the workplace on a team. We want to collaborate more with people who we trust. The work that she did first on self-awareness and then on managing herself more effectively, then noticing how she was impacting others around her, and again, manage even more, that allowed her to build stronger relationships, relationships that were now founded on trust.

That allowed her work to be more effective, so not only is she more productive, her team members are more productive. Of course, that impacts the bottom line for the organization in a positive way. She's a great example for me of when somebody takes this seriously and leans in and do the work around building emotional intelligence.

Mandy: I love that example. I think that's really important to look at because, especially in her case, and I even myself can identify a little bit with the bulldozer attitude, but also because a lot of times we get stuck in, "Well, that's just the way they are. That's just their personality."

I love that in this example, it wasn't, "That's just the way she is." It was, "Let's take it and use it and even change." The feed-forward is such a great thing, too, because you can get feedback like that and you hear it, and then maybe you try and rationalize it away. But for her to step back and become more self-aware is really important. A lot of times we get stuck at the office, "That's just how they are. Work around it. Work around it."

Lisa: Interestingly enough, Mandy, when Samantha and I first started working together, that was her belief as well. She would say to me, "This is how I'm wired." She said, "When I was hired in this organization, they

spoke to folks. They introduced folks and they knew that I was an aspiring person who got things done.” Well, the truth is that will take you only so far.

Now she was at this place where she realized it wasn't enough to take her further. She now realized that she had to shift her mindset. It took her a little bit to be open to this idea that emotional intelligence is cultivatable. We can't cultivate IQ. It is what it is. You can gather tons of information, but we really can't extend someone's IQ, but we definitely can... We know this to be a fact from research, and we know it to be a fact from anecdotal evidence, that we can cultivate emotional intelligence.

Once Samantha really got that in her head, because of her ambition and her drive, that's when she decided, “Well, this is going to be hard, but I've got to do this.” Here's the interesting thing. At first, it was not easy for her.

In fact, there are times when we would come together for a meeting and she said, “This is some of the hardest work I've had to do.” Because it was a new way of thinking and behaving. That was unusual. At one point she said to me, “It's like I show up at work wearing two left foot of my shoes. I feel like I'm walking in an awkward way.” I would encourage her to keep doing what she's doing. Keep practicing the behavior because literally what's going on in your brain is you're rewiring and wiring neurons to help you to show up stronger in this behavior.

Over time it became natural for her. She is now very good at using her emotions to help her navigate situations. Our emotions help us to understand the information that's coming to us from the world. It's the information to guide our thinking and our behavior.

It helps us to manage and to adjust to the environment and to people, so that we can make better decisions. It's an integral part of how we make decisions, whether it's the people part of the decision, the business part of the decision, but it's understanding what message those emotions are providing for us and then how to use them well.

Mandy: Yeah, I love the saying neurons that fire together, wire together. It's about doing those two left feet until they feel comfortable. What do you say to teams or people who see emotional intelligence and this topic as something for females to work on, or this is the fluffy side of business? I know you made that case to us when we first talked about it. How do you explain that to people?

Lisa: This isn't a male thing or a female thing. When I hear folks talk about, for example, teaching soft skills. These are *the* most essential skills for leaders and teams to have in their organization. Again, I say, because leaders are fired for their lack of emotional intelligence. This is essential whether one is a female or a male. It's also essential whether you are the leader or you're reporting to a leader as part of a team because there are times when we find that we may have a number of folks on the team who are high in emotional intelligence. Then we have a handful of folks who are struggling in this area because they've not been exposed to the tools to help them develop in this area.

Picture yourself being on a boat. If there's a hole in that boat and water is coming into the boat, everyone in the boat is impacted. Those on the team with high levels of emotional intelligence, I believe they have a responsibility to be supporting others. Especially, for the leader.

Can you imagine a leader whose level of emotional intelligence isn't where it needs to be, male or female? As the water is coming into the boat, they are primarily responsible for making sure that everybody on the boat is safe. At the same time, even saying that, I still believe that each team member has a responsibility for building out his or her emotional intelligence to ensure that they play their specific role in keeping that boat afloat and ensuring that the water isn't coming in on them.

It's something that's essential for every single team member. For example, the team I'm working with, it's a major global tech company that I'm here in Seattle for right now. A huge part of the work that we're doing this week is we're combining emotional intelligence with conversational intelligence to enhance communication and collaboration across the team. These are brilliant, savvy folks.

It's a great mixture of males and females and they all see the need for this. Why? Partly because they have seen over time where the team has underperformed, underfunctioned, because of lack of effective communication and cohesiveness among the team. It's not a frou-frou female thing or a fluffy thing or soft skills. These are essential skills for effective leadership and effective team functioning.

Mandy: Well, that was asked and answered. We surveyed women in the anti-fraud profession last year, and by far the topic that they wanted to hear about at an event or in a podcast was building a team. This question is for men, too, who are on a team led by women or leading a team as well. What advice do you have... Maybe what's your insight into why this was the biggest topic they wanted to hear about, about women who are leading and building teams?

Lisa: Right. Well, the reality of our world right now is most, if not all, the work in organizations now are being done in teams. That unit has become so critical to the functioning of organizations, and as women are getting more space at the table, we are finding ourselves at the table more in decision-making capacity, leading and managing teams. It becomes crucial for women leaders to understand how to prepare themselves for this leadership situation and how to navigate and develop their teams effectively.

It goes right back to what we're talking about a few minutes ago. Any woman who desires, I believe, to be a leader in her organization, she has to first start with leading herself well. Which is where building emotional intelligence, developing self-awareness, becomes critical, because she cannot effectively lead her team if she is not effectively leading herself.

One of the challenges that I see, and I get the opportunity again to coach a number of female leaders in different organizations large and small. One of the primary challenges I see with many of my female leaders is the struggle to exude confidence and part of what we call executive presence as they're managing the team. Quite often, there is this misperception that they've got to behave in some sort of male-like way, however they're going to define that, right?

Rather than being an assertive leader, they become a bossy person, which I make the distinction between a person who's a boss and a person who is a leader. A person who is a leader is someone who knows herself and carries herself and leads in such a way that people want to follow her. She's confident, she's inclusive. She has the ability to influence and to think strategically. A boss is someone who tells people what to do. They look for the limelight. They are not so focused on coaching folks. That sort of thing.

My female leaders, I encourage them to do the work on their person so that when they sit in that seat of leadership, they have leverage in terms of being able to influence others. They have so developed the trust of their people. Which that's something they've got to work on in terms of connecting with their team members, understanding who they are, understanding their capabilities, understanding their areas that they need to grow in and feed their team members in a way that the team members really see them as a leader who wants to guide them, a leader who has a vision, a leader who knows what it takes to build a team.

Again, it starts from the foundation with the individual leader, and it starts with her understanding herself and understanding her people, giving them the support, the guidance that they need to help ensure that they too can pick up the vision of the team, the vision of the organization and run with it.

I also encourage my female leaders to consider leadership as a collaborative effort. Because you may be the one with the title of vice president or senior vice president or director of this team, leaders who tend to flourish well and see their team flourish well are leaders who distribute that leadership among their team

members. Meaning that we are accomplishing this together and they are always tapping into the wisdom of their team members rather than relying on their position of power to determine what needs to be done and how it should be done.

Mandy: That's great. That's such important, great advice. Starting with leading yourself before you're leading other teams and other people. I could talk to you forever today. You know that. But I do have to close this out. Thank you so much for talking with me today.

Lisa: Mandy, it's been my pleasure. Look forward to us connecting again.

Mandy: Yes, thank you.

Lisa: Thanks so much. Bye-bye now.

Mandy: Thank you so much for joining us today on Fraud Talk. We are excited to be celebrating International Women's Day, March 8, and International Women's Month during all of March. I am also excited to report that you get the firsthand knowledge, the inside scoop, on our 2021 ACFE Women's Summit. The date will be March 4, 2021, in New York, and more details will be coming soon. Thanks for listening.