

Ep #3: The Practice of Same-Page Leadership



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With Your Host

Ellie Frey Zagel

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Ep #3: The Practice of Same-Page Leadership

Hi, this is episode three. Today we talk about practical ways on how to get and stay on the same page when you work with your significant other. Enjoy.

Welcome to *The Family Business Leader Podcast*. A podcast for multigenerational family business leaders who want to become the leader they were meant to be. If you're ready to learn how to develop your own authentic leadership style, successfully lead your family business and create your own lasting legacy while still honoring theirs this is the podcast for you. I'm your host, Ellie Frey Zagel, family business leadership coach and third-generation family business leader. Let's get to it.

Hello, hello my friends, my chosen family. How are you doing? How are you doing today? My name is Ellie Frey Zagel, host of the *The Family Business Leader Podcast*. I am thrilled you're here. I want to start off this episode sharing a – I don't know if it's a testimonial. We'll call it a testimonial, kind of an audience testimonial, if you will, from Steven.

So to date, episode 064, Next Gen Leadership Development with Janice DiPietro, and episode 011, Digging into the Family Business Landscape with Daniel G. Van Der Vliet have been essential tools that I have continually returned to for inspiration, knowledge and family business based solutions. Thanks for working behind the scenes to continue the conversation about family business.

Steven, thank you so much for writing in and sharing that testimonial with me, the fact that you listen over and over again especially means the world to me. Thank you for all you do in the world of family business and with your family. I just love receiving these notes from my listeners. So if you have a favorite episode you want to share with me I would love to hear it. Please just email me and I can share it on a podcast episode. That would be fun wouldn't it? So alright, let's get started today.

Today I want to talk about how my husband and I specifically get on the same page, get and stay on the same page. And then as I was doing the work, identifying what this looked like I also realized that my clients, a husband and wife team, second generation of their family business also

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has been working to get and stay on the same page. They've been doing a really great job. So I think that what I'd like to do is start off with their story. And I think we might try to have them on the podcast as well. And then I will talk about what my husband and I do.

So I have the second generation husband and wife, he is the President of an in-law of the family business. She works in organizational development. And they are right now learning how to work together. And some of the issues that they were having was they were just constantly business partners instead of husband and wife. So some of their relationship was kind of taking a backseat because they were so focused on their business relationship, they also have kids.

And so somehow the two of them, their relationship just was again was taking a backseat, it just wasn't being a focus. And I think both of them were feeling that loss. They were also fighting more than they wanted to about work issues because they weren't on the same page and they weren't able to get on the same page. And they were making some assumptions and some judgments.

And so what we did is we kind of developed, we helped them work through the how to get on the same page framework that I shared in a previous episode. And when they did that they realized that it was actually pretty easy to get on the same page and they didn't need to fight and argue as they had in the past. So what they have done is whenever there is something that they need to discuss as either husband and wife or as business partners or both on the senior leadership team, they do run a lot of the business together.

So even though he is the President, she is organizational development, they are each other's sounding boards. So I say this because that can also create conflict. And so understanding what hat you're wearing when you go into a same page leadership conversation is incredibly important. Am I wearing the hat as a President? Am I wearing the hat as a husband? Am I wearing the hat as a father? What hat am I wearing? So what they're doing

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now is they're identifying what hat they're wearing, what position are they taking when they talk about whatever they're talking about?

So for instance it could be who is in the right seat? Are they in the right seat? So it's a personal issue or conversation. And she'll say, "This is what I think." And he'll say, "This is what I think." And they'll look and like, "Okay, are we saying the same thing? Are we saying something different?" And so they identify how are they on the same page? For instance they may be at the same page that they do want this person to work for the company. They do think that they are a cultural fit. They do have a job description. They do think that this person isn't fulfilling that job description.

But how they're not on the same page is how to handle it. Again so they get really curious how are we on the same page? How aren't we on the same page? Then they talk it through if they can become aligned. Or do they need more information? And then they're able to identify those next steps. So it's a little bit like a funnel, you throw out this argument. You think you're not on the same page at all. Then you identify, kind of narrow this funnel, you identify how you are on the same page. And you identify what the actual problem is so narrowing it further.

And then that problem, what do you need in order to get on the same page? And you kind of go through that framework that I shared with you before. If they really just can't get on the same page they will table the conversation if necessary. They'll say, "Let's talk about this", 24 hours later. "Let's talk about this in a couple of days. Let's talk about this after we've talked to the senior leadership team." And on that note what they've also done, this has been so successful, so what this also allowed them to do is help the senior leadership team get onto the same page.

And the senior leadership team, I mean for those of you who manage senior leadership teams, we've got sales and marketing, we've got operations, we've got the CFO. You have a whole bunch of different people, of different mindsets, different backgrounds kind of coming together to move the company forward. So it's really powerful to use the same page leadership tools now with their leadership team.

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So the result is they are now having business meetings together and they will be able to get their business done, the business of the kind of being business partners in those business meetings. They also have separate time where they can go on date nights and work on their relationship, or work on the business of running the household together. So they separate things out. They're able to have much more of a balanced relationship.

They know what hat they're wearing, as you can imagine way fewer arguments. And the arguments they do have they have the tools that they need in order to resolve them really quickly. You're not going to bed mad. So that is the example from one of my second generation clients.

Now I want to share with you what my husband and I do. So this is slightly different. My husband and I are each other's board members. I don't work in his business. He's a financial advisor with Edward Jones. And he doesn't work day-to-day in my business. And but we do manage the household together. We do love each other. We do have a son that we're trying to parent. And so what was happening is that we were both working and growing our businesses. We're both trying to raise an amazing child.

And we're both trying to have a household that functions and things were just not working. I assumed I was doing something, he assumed he would do something. We'd show up at the same time and get really frustrated. We had lots of arguments, lots of frustration, lots of confusion, who's doing what. There was a little bit of loneliness. I felt like he just doesn't understand, I'm alone in this, I can't talk to him. And I'm sure he was feeling the same thing. As I mentioned, there were scheduling mishaps.

Or what would happen would be like, "Hey, who's picking Steven up from school today?" And he's like, "What are you talking about? You just told me you were going to do that." I did? So there would just be this misremembering too. He thought that I would do something. I thought that wasn't resolved. Again we just weren't on the same page. There was so blame like something happened, "I thought you were going to do that." "No, I thought you were going to do that." Or me, it's just all my fault. I feel like you're always blaming me, it's all my fault. That's a little bit of my drama.

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Which makes you feel terrible, if I'm thinking it's always my fault, my husband always blames me. Maybe he's right. Just totally shut me down. Now I wasn't able to even have a discussion. And I would give up instead of trying to resolve things. Or if something got really bad I would just try to avoid the conflict altogether. I wasn't alone in this because we do love each other. We want each other to be happy. We want our relationship to be successful. We don't like fighting with each other yet we couldn't figure out how to get and stay on the same page.

So after years of bickering, and misalignment, and not being on the same page and just feeling terrible about it we also realized that this wasn't working. We're both aware. I may be the coach of the relationship but my husband could easily be a coach and that's what he does with people around their money. And so it was like we just realized that our fighting, and our frustration, and our confusion it just wasn't working.

So what we did was we talked to other couples, other couples who worked full-time, who were growing their own practices and asked them what they did.

And one of the first pieces of advice that we got was actually the question, "Do you have a family calendar?" I'm like, "No, we sure don't have a family calendar. Tell us more about the family calendar." So the family calendar is a tool to really start getting you on the same page because now you know with the family calendar when you're going to work late, when the board meetings are, who's going to pick up whom, what is happening. So how my husband and I do this is, I have my work calendar. I use Google Calendars.

And then I also have a color coding that links to our family calendar. Our family calendar is a Google Calendar that both my husband and I share. And so it downloads into my phone, downloads into his phone. And it's just color coded that says – and I put things after 5 o'clock that I'm doing. So he knows that if I have a board meeting until six, he knows that. And the chances are he's going to pick up Steven if we haven't already made that discussion, that determination.

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So we have a family calendar that we can easily see what's happening in our day. I have an 8 o'clock call or I have 7:30 physical therapy. So he knows if he's checking the family calendar. And that's the point. You're going to need to check your family calendar. He knows that he's going to be taking Steven to school. He's going to be getting him ready on those days.

So something that will be a first step, if you don't currently have it, you want to be and stay on the same page, creating a family calendar that both have access to that you check, that's easy to check, is a great first step and it's a pretty big deal.

The next thing that we did was we created a whiteboard and we put the whiteboard on our refrigerator. And the whiteboard includes who's dropping Steven off, who's picking Steven up and what we're having for dinner. And we identify this each week on Sunday afternoons. Basically it's 20 minutes on a Sunday so we can get on the same page for the week. So for us who is dropping Steven off? Who is picking up? What are the meals? And actually what's happened lately is anything – what's happening after school.

So if Steven has soccer or if he has some sort of sports, or some sort of afterschool class, we'll also identify what's happening then. If I'm traveling, that is also going to go onto this whiteboard. It's just a quick snapshot on our fridge in the middle of our kitchen the kind of highlights, what's happening through the course of the week so there's no confusion and we know where to check.

We also do daily check-ins. So in the morning what we try to do is, "What does your day look today", every morning before we each go to work just to kind of reiterate and make sure that we're on the same page, that nothing has changed. Around 4 o'clock we'll also check-in, sometimes at noon, but mostly it's at 4 o'clock, just a quick check-in. "Hey, you're picking up Steven. This is what we're having for dinner. I'll see you at what time." Just a quick check-in, does not have to be long, five minutes. For me it can be in between clients.

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And that really helps day of just to make sure that nothing has changed because things change, that's life. These check-ins are just a great touch point.

We also schedule date nights, just as I mentioned about my clients, it is important that Chad and I have time together outside of the relationship. He is one of my top priorities. Go listen to the Priority episode. I am my top priority because of mama. If I'm not healthy, nobody's happy. My husband is my second priority and then my son is my third priority. So I want to make sure that I have time just for Chad and I. This is a tough one for us because we are – we love spending time as the three of us.

And it's very easy for us to go a couple of weeks without date night. But I can feel it. He can feel it when we don't do this. I'm like I need my husband time. I just need adult time. And this time we'll go to dinner. We'll go, like when we used to go to the movies, we'll go do a cultural event, whatever that is but it's just the two of us so he and I can connect. This is very different than the business meetings we have.

So once a month Chad and I will sit down and talk about our businesses with each other. We'll check-in, we'll talk about our businesses, we'll kind of evaluate is this working okay? Are we mostly on the same page? So it's not just a one and done type of situation, I mean one and done. We don't just do the family calendar. We don't just do the whiteboard. We don't just do the check-ins. We evaluate to make sure that that's what we need and those things are working. And if they're not working we'll try something different. This is kind of always a working progress.

As we grow, as we develop, as our relationship develops, as Steven gets older we may need to change some things. I would say the last things that we do are over-communicate and that might be annoying for some people. We know that our life is better together when we are on the same page, when we are operating together, when we are running together, rowing together, whatever the metaphor you want. We know that that's where we want to be.

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So, over-communicating to us is totally fine, we find our balance. But I'd rather over-communicate than under-communicate, because under-communicating leads to confusion, arguments, not being on the same page.

We also give each other what we need. So I've launched this business. I'm growing this business. I'm thinking about my business and sometimes I'm just exhausted. And I just need a break from it all. I'll be able to communicate that with Chad. And Chad's like, "No problem. I'll pick up Steven. We'll go have dinner. You just have a night to yourself."

Sometimes Chad needs to work late. He's got a big presentation coming up, big client meeting. He just needs to work late. No problem, I'll take care of it, on it. I'll put Steven to bed. We help each other out without guilt trips, without judgment. We just do it because that makes it work better. He's there for me, I'm there for them.

And I think that's the last thing I would like to point out is that we also take responsibility for our own thoughts, feelings and actions. The partnership is two, not just one. So if Chad is feeling super stressed at work I'm going to take responsibility in the sense that maybe I could have given him more time so he could take more time at work. Or maybe I need to pick up the slack at home because he is being overburdened at home and that's carrying over to work.

So what this does, this one thing, just by taking responsibility for my own thoughts, actions, feelings, results, you could see how that decreases the blame game to basically nothing, when I'm having thoughts about my husband who should be doing this or that. Those are my thoughts, very rarely anything to do with my husband. And then I can tell him, "Hey, I'm having these thoughts. I'm going to clean them up." And then we can have this conversation.

So I own my own thoughts, my own feelings, and the actions that I take. Alright, I'll speak more about that, because that's a lot of the coaching that I do.

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Alright, so the result of the work that Chad and I have done together is that we have better, easier, more open and honest communication. That's huge for us. I don't know. A lot of times, couples that I've spoken to who work together and live together they're like, "I don't want to hurt their feelings. I don't want to stress them out. So I'm basically not going to tell them the truth." And we do this from a good place because we love them and we don't want to stress them out more. But what it means is we kind of lie to them. Not kind of, we do, we do lie to them.

If you have a relationship, and this takes work, where you know the other person loves you and the other person chooses you. And that's never on the line; just know that in you. Then the rest of it is just how do we figure this out together? For me it just takes a lot of the emotion, the drama out of any problem.

Having an open and honest conversation like, "Hey babes", that's what I call my husband, babes. "I'm having some issues around this. I'm having some insecurity around this. I'm still working on it myself but I just wanted to let you know the reason I've been snappy lately, or I just snapped is because of I'm having some insecurity about this particular issue." And again there's no drama here, I'm just kind of sharing where I am openly and honestly.

Or, "Hey, I just need to go to bed early, do you mind taking Steven?" And not worrying that he's going to judge me because I'm going to bed early because he loves me and he wants me to be healthy. As you can kind of tell this also leads to respect where his business is, what he needs to do for his business, what kind of stage of life, that's the word I'm looking for. We each get what we need. We talk about that constantly, what do we need? We are very intentional with our time together and with the family. So we make each other a priority and we make the three of us a priority.

We're able to get on the same page easier. We have fewer arguments. And honestly, there's less home life stress. We don't bring our arguments home. We don't usually argue at home, rarely, because we have done the work to kind of stay on the same page, to – well, we've done the work because

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we've identified why we argue and we've solved for that problem. And for us it's because we weren't on the same page and so we solved it by really working together to get and stay on the same page.

Alright my friends, hopefully that was helpful to you. If you work with your significant other and you would like to have a mastermind of other couples who work together, learn from each other, get coaching through a weekly coaching mastermind. Look in the show notes. There is a link to the mastermind. Or email me at ellie@successfulgenerations.com and I'll give you the information. Have an amazing week and I'll talk to you soon.

Well, there you have it. Thank you so much for listening to *The Family Business Leader Podcast*. If you've enjoyed today's episode, be sure to share it with someone who needs it. If you'd like more information about family business leadership development, please visit successfulgenerations.com. I can't wait to connect with you again next week, until then.